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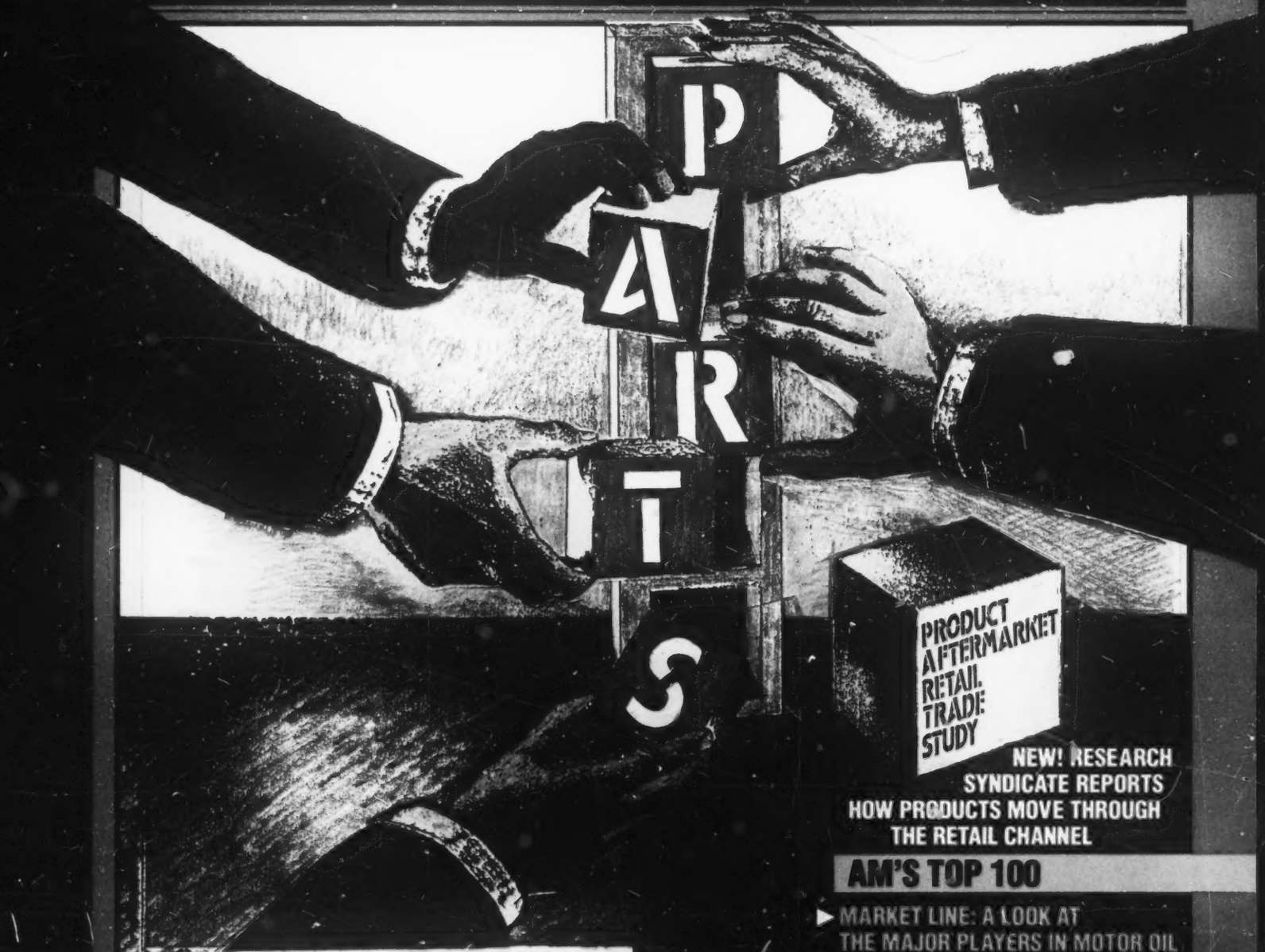
The Marketing/Business Magazine For The Retail Aftermarket

OCTOBER 1989



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PUBLISHER'S NOTES

RETAIL TRACKING

Here at *AM*, we hear the same concern over and over, "This industry has no good numbers!"

Count on *AM* to provide the best and most needed research. Now, with the help of 14 aftermarket suppliers who formed a research syndicate with us, *AM* has another means to provide you with data.

In this issue, we publish the results of our first PARTS (Product/Automotive Retail Trade Study) research. Here you can read about product movement, space devoted to products in retail outlets, inventory turns, and product margins. We welcome supplier queries about participation in future PARTS studies.

Another *AM* research project we're pleased with is our popular list of the Top 100 retail parts chains. This year, we added information about the chains' service bays.

In addition, our statistical section provides data for business planning for your aftermarket sales.

In Market Line, we look at the motor oil sales, including the effect of quick lubes on aftermarket oil sales.

I hope you'll find it all interesting, and useful, in your business. Let us know what else you want to read about in our pages! ■

Sarah J. Frankson
Group Publisher

MARKET LINE

COMMENTARY

Gaining Share Of The Motor Oil Market Is A Slippery Business

Motor oil is the Rodney Dangerfield of the automotive aftermarket. Even though some 700 million gallons sell annually at retail, according to the National Petroleum Refiners Association, Washington, DC, retailers and suppliers alike complain they can't make money selling oil.

At the Chicago APAA Show, a retailer moaned, "My oil sales were way up this year. Unfortunately." And several other retailers concurred.

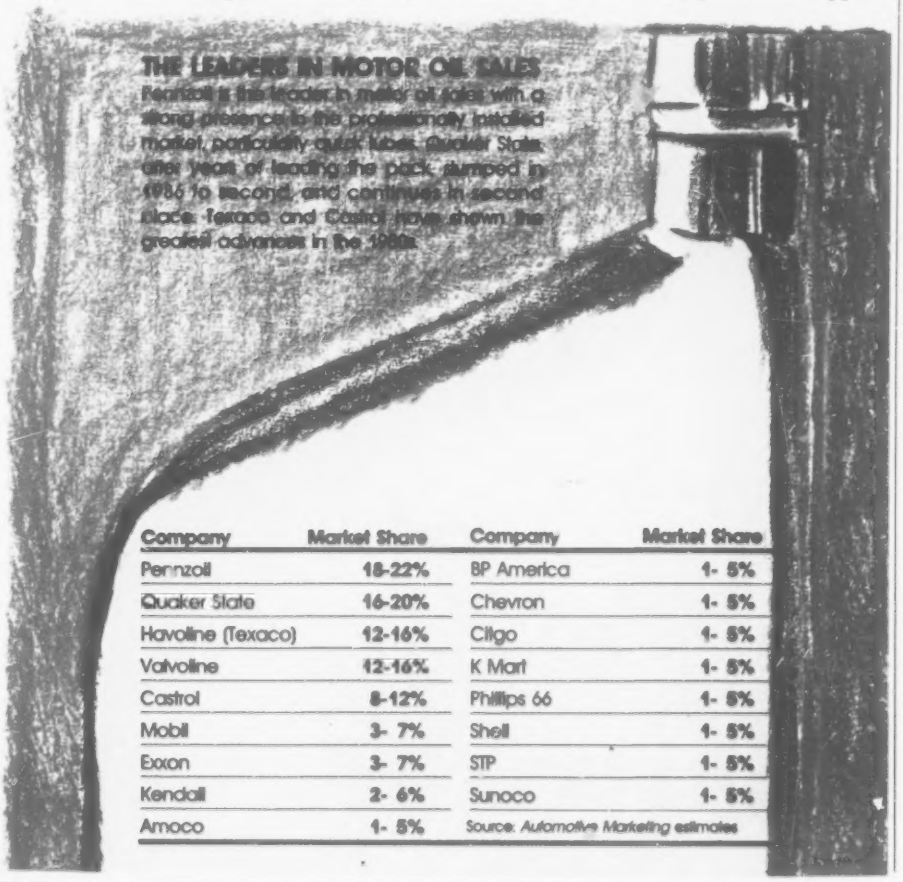
For their part, quite a few suppliers whined about retailer demands; one said flatly, "It's not a happy relationship any more. It's not co-op anymore. It's 100% extortion. Retailers are going to kill the golden goose."

Another national sales manager said, "Retailers and manufacturers both have shot themselves in the foot. They've taken a technologically sophisticated product and, by discounting and rebating, undermined the image of the product, the strength of the category, and the brand."

This year, we heard a lot of talk about setting "realistic" pricing. One supplier said, "Twelve dollars a case wholesale would be great," but conceded he would settle for $10 or $11, a price most suppliers agreed with. But with five major brands, and close to a dozen would-be major brands, competing for the same shelf space, setting a price floor is not competitive. And it's not likely to last. At least one small retailer we spoke with came away with an $8.88/case deal with 5% co-op funds from two oil companies.

Several companies said they are firmly resolved to end rebating. "It's a difficult decision," one ad manager conceded. "We may lose business in the short term, but it will be good long term." Another said that losing a few points in market share might actually be better for the bottom line.

Still another ploy is to sell added value from improved additive packages. But as one major oil company's national accounts manager noted, "If trade discounts and giveaways get too deep, there's insufficient money for consumer ads. No one's ever done a good job of educating the public on added value. And no one's ever done a good job of differentiating their oil. Except Castrol," he added.



THE LEADERS IN MOTOR OIL SALES

Pennzoil is the leader in motor oil sales with a strong presence in the professionally installed market, particularly quick lube. Quaker State, after years of leading the pack, slumped in 1986 to second, and continues in second place. Texaco and Castrol have shown the greatest advances in the 1980s.

Company	Market Share	Company	Market Share
Pennzoil	18-22%	BP America	1- 5%
Quaker State	16-20%	Chevron	1- 5%
Havoline (Texaco)	12-16%	Citgo	1- 5%
Valvoline	12-16%	K Mart	1- 5%
Castrol	8-12%	Phillips 66	1- 5%
Mobil	3- 7%	Shell	1- 5%
Exxon	3- 7%	STP	1- 5%
Kendall	2- 6%	Sunoco	1- 5%
Amoco	1- 5%		

Source: *Automotive Marketing* estimates

The Big Five

Five major brands dominate the retail oil market:

- Pennzoil Products Co., Houston
- Quaker State Corp., Oil City, PA
- Valvoline Oil Co., Lexington, KY
- Havoline (Texaco Lubricant Co.), Houston
- Castrol Inc , Wayne, NJ

These five, together with Kendall Refining (divison of Witco Chemical), Bradford, PA, are retail-oriented brands and bitter rivals. In addition to retailing oil, the companies control a large hunk of the quick lube market.

However, the retail market became more complicated in the 1980s with the entrance of the major integrated oil brands. By integrated, we mean companies that drill for, refine, and market oil, as opposed to the retail refiners, which simply refine and market. Many of the retail brands buy crude from the integrated companies.

Previously, the integrated companies

mainly sold oil through their own gas stations. But the two oil shortages of the 1970s decimated the ranks of the full service gas stations. A national accounts manager described the change succinctly, "A few years ago we put our briefcases and a pile of order blanks in the car and went to learn about the retail oil market. We saw the service station oil sales going away. The amount of oil sold in service stations now can fit in a thimble. We presented retailers with the same kind of deal we gave our service stations.

"Retailers told us, 'Big deal.'

"So we put our briefcases back in the car, packed up the order blanks, and came back to the office and worked out some new numbers. We have to sell 5- to 10-cents under the retail brands. We have to make some major advertising/co-op commitments. We have to pay our dues."

A More Competitive Market

Thus, what was a highly competitive market became even more competitive when the deep pockets of integrated oil companies were added. In addition, technology in the form of smaller crankcases and better oils, and new quick lube operations taking away retail sales, ensured slower overall retail market growth. Without market growth, oil suppliers must steal market share from each other to grow sales.

How successful have the integrated companies been at gaining share? Well, according to Mediamark Research, New York, the big five retail brands *increased* their combined market shares from about 59% of the market to about 74% of the market between 1980 and 1988.

Although conceding that none of the integrated companies has made a real breakthrough in retail oil sales, the national retail manager for an integrated company said, "The key is patience and persistence. You don't build market share overnight. You do it with continual, consistent advertising. We're fighting a consumer perception built over a long period of time. I think we can still make our goals."

This said, it looks as though the integrated oil companies will continue to aggressively pursue the retail market. And while one company condemns another for "whoring the market," the accused company responds that they're just being "responsive to the needs of our customers."

None of the integrated companies has more than a 4-5% market share. Most are much lower. Right now Exxon Co. USA, Houston, and Sun Refining and Marketing, Philadelphia, are the most active. Others like Amoco Oil Co., Chicago; Citgo Petroleum, Tulsa; Mobil Oil Co., Fairfax, VA; Phillips 66 Co., Bartlesville, OK; and Shell Oil Co., Houston, have all made some inroads into the retail market.

This leaves the big five retail brands. Within the five, there have been some major changes. Pennzoil has replaced Quaker State as the number one brand in the last three years. Texaco and Castrol have both gained shares in the 1980s. We'll look at them one by one.

Pennzoil and Quaker State are the only two retail brands that are truly national. Until the 1980s, Pennzoil's market strength was west of the Mississippi while Quaker State was stronger east of the river. This is no longer true. But Havoline, Valvoline, and Castrol still have regional strengths. Texaco, for example, is very strong in the Southeast, while Valvoline is stronger in the center of the country.

Top Of The Heap

Pennzoil and Quaker State are at the top of the heap. All oil suppliers say

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Pennzoil is number one with about 18-22% of the market while Quaker State is a few points lower at 16-20%. Competitors point out that Quaker State did not lose the lead, Pennzoil earned it with consistent advertising and promotions. Pennzoil also benefited from the growth in oil sales through quick lubes. The company practically invented the concept in the late 1970s. In 1988, Pennzoil bought up 80% of Jiffy Lube's stock which gives it control of over 1,000 Jiffy Lube franchises in addition to selling another 1,000 or so independent quick lubes.

While the market shares are close, Pennzoil is in better financial shape. Pennzoil revenues were $2.274 billion in 1988, more than twice Quaker State's $869 million. In profits, Pennzoil earned $118.3 million to Quaker State's $14.6 million in 1988. In addition, Quaker State is frequently mentioned as a takeover target and has been doing some retrenching.

But Pennzoil is not home free. Setting aside a $3 billion settlement of its suit against Texaco for tampering with Pennzoil's acquisition of Getty Oil, Pennzoil operated at a loss in 1988 (although the motor oil division made $110 million). And, although Pennzoil acquired the profitable Facet Filter Co., Tulsa, OK, in May, 1988 (Facet contributed $7 million to Pennzoil profits in 1988), it also absorbed 80% of Jiffy Lube's financial difficulties early this year.

Quaker State insiders say the company's primary goal is an acceptable return. "We're not going after market share or volume at any cost," said one insider. Quaker State is also a very viable force in the quick lube market. Quaker owns Minit Lube (about 425 outlets, sales of $59.3 million in 1988, the number two quick lube) and absorbed 65 McQuik out-

A LOOK AT THE BIG TWO

Pennzoil, Houston, and Quaker State, Oil City, PA, split about 40% of all motor oil sales, a situation that's existed for some time now. Although both own a few service stations (Pennzoil owns 543 and Quaker State 196), the vast majority of their oil sales are through retail outlets or quick lubes. In the 1980s, both companies moved into the quick lube market by buying a chain outright (Quaker State's Minit-Lube) or buying control of a chain (Pennzoil owns 80% of Jiffy Lube stock). Still, despite the similarities, the two motor oil leaders are very different in structure as a glance at parts of the financial reports show.

PENNZOIL 1988 Revenues (in millions):	
Motor Oil & Automotive Products (Pennzoil, Gumout, Wolf's Head and others)	$1,312.2
Crude oil and natural gas sales	445.5
Sulphur sales	262.6
Filters (since May 25, 1988)	216.1
Other (Mainly interest from Texaco payoff)	156.2
Intemol oil sales	(118.7)
Total Revenues	**$2,273.9**
Pennzoil net income (loss)	**(187.6)**
Net income with $1,662.4 from Texaco payoff)	$1,459.7
Operating income from motor oil	110.8
Operating income from Facet Filters	7.0
QUAKER STATE 1988 Revenues (in millions):	
Motor oil sales	$562.0
Insurance and other business	138.4
Coal sales	109.4
Minit Lube sales	59.3
Total Revenues	**$869.1**
Quaker State net income	14.9
Operating income from motor oil sales	11.3
Operating income from Minit Lube	6.6

Source: Pennzoil and Quaker State Financial Reports

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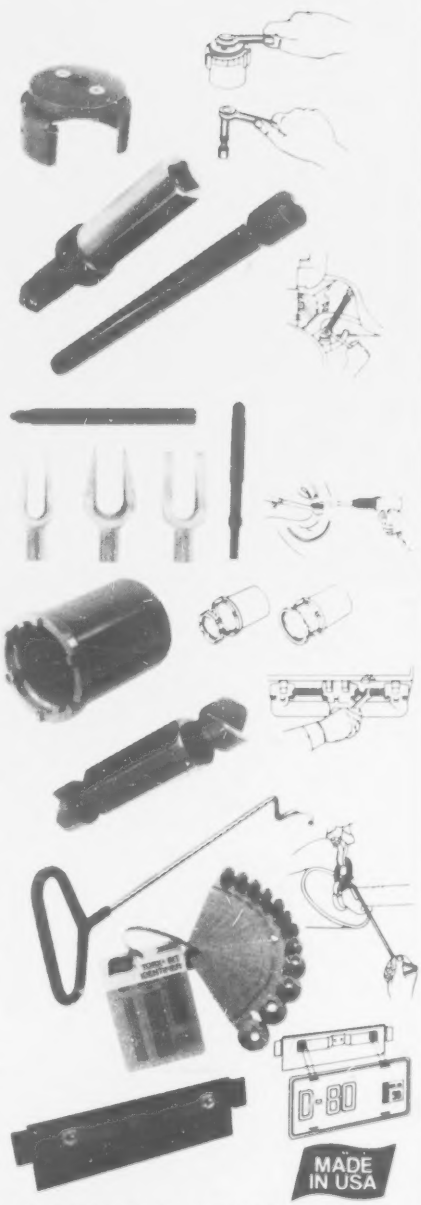

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lets into Minit last year. In addition, Quaker State is the oil of choice at Grease Monkey (155 outlets), and supplies about 1,000 more independents. Pennzoil started early in the quick lube market but Quaker State has made up a lot of ground in the past five years. Better yet, Minit Lube produced $6.6 million in operating income in 1988. Since quick lubes represent a higher margin than store sales, Quaker State may well put an even greater effort into that market in the years ahead.

Just behind the two top guns come Valvoline and Texaco. Both enjoy market shares of about 12-16% and draw a lot of fire from competitors. Both are also divisions of larger companies. Valvoline's $571 million in oil sales represents only a small part of Ashland Oil's $8.3 billion in sales. Texaco, with sales of about $32 billion, does not even bother reporting motor oil sales in its financial statements. As one competitor said with only slight exaggeration, "Texaco tracks more crude oil in a day than we do in a year."

Texaco stands alone as the one integrated oil company with a significant share of the retail oil market. Asked why, a competitor said simply, "Money." An intangible mentioned was the fact that Texaco sells oil under the Havoline brand (which it acquired from the defunct Indian Refining Co. in the 1930s), and avoids a connection with the Texaco gas station brand. Interestingly enough, Exxon is using a similar strategy with Superflo brand oils rather than sell the Exxon name. Texaco spent $26 million in TV ads in 1988 to build consumer awareness of Havoline, more than twice the ad budget of any other retail brand.

Valvoline has always been a steady number three or four. While competitors think Texaco may only be renting market share, Valvoline owns its share. Still, the company has some weaknesses. Operating profits from oil were down to $30 million from $48 million in 1987 due to costs for additive formula changes and low margins. Although no numbers were given, Valvoline Rapid Oil Change, with close to 200 outlets, operated at a loss in 1988. Valvoline strategy centers around getting profits up with less discounting.

The number five company is Castrol (owned by British Burmah Oil) with about 8-12% of the market. Out of 19 *Automotive Marketing* interviews with oil suppliers and retailers, the word "niche marketer" appeared in every one when discussing Castrol. The company pushed the idea of Castrol as specially designed for small engines throughout the 1980s. Castrol also sells oil to many foreign car dealerships which endorse the concept.

No Dramatic Change

No one expects any dramatic change in the oil market in the next year or two. It's a "repositioning year," according to suppliers. Profits and better pricing are the watchwords. One supplier said, "Maybe we can break the $1/quart barrier in the near future. That's the hurdle and ease up price compression."

And we might end with a comment from the owner of one repair shop. He said, "Since the specialists arrived, we've become sloppy. We let the oil changes go. Our mechanics don't like to do them anyway. It's dirty and they don't make money. But we not only lose oil and oil filter sales, but also air filters, wipers, little things like that. So we've added a 'While You Wait' service. Now we're back in the oil change business." ■

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Automotive Marketing's first annual study of product movement and inventory sets aftermarket benchmarks.

by **P. Royall Katcher,** Research Editor; **John Wirebach,** Senior News & Features Editor; **Gail Krueger-Nicholson,** Managing Editor & **Lorraine Evans,** Editorial Intern

Products are the lifeblood of the aftermarket.

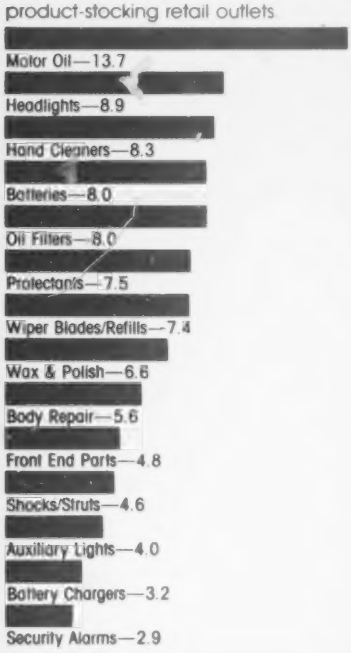
But too many retailers lack benchmarks with which to measure their product performances in terms of turns, gross margins, SKUs, and square footage of display space alloted to them. Hence, we present *Automotive Marketing's* first annual Product/Aftermarket Retail Trade Study (PARTS), the study that answers these basic ques-

PRODUCTS BY SKUs

The SKU (Stock Keeping Unit) is the basic, individual product as differentiated by size, purpose, maker, package, or other product difference. The following products are listed by mean amount of SKUs stocked by all automotive product-stocking retail outlets.

PRODUCTS BY TURNS

Turns are the number of times this individual product is sold annually. The following products are listed by the mean turns for all automotive product-stocking retail outlets.



tions and provides industry benchmarks.

The study's purpose was to provide as much specific information about major aftermarket product categories as possible, so retailers can gauge their own performances in these categories.

To do this, we turned to Chilton Research Services (CRS), one of the country's leading market research organizations. We provided CRS with a list of 4,000 top retailers—volume aftermarket retailers, jobber/retailers, grocery chains, discount and department store chains, and others—which handled automotive products.

CRS mailed a ten-page questionnaire to each one of these companies. A postcard reminder followed a couple of weeks later. Within a month, almost 400 companies returned completed questionnaires. After screening, and eliminating unusable replies, CRS was left with 305 useable responses. This became our data base.

The Respondents

Those who answered our questions hold jobs that enable them to have the information we requested. In all, 54% are company owners or presidents. Others, fewer than 10% each in each category, are buyers/purchasing agents, comptrollers/secretary-treasurers, directors, general managers, merchandising managers, sales managers, and vice presidents.

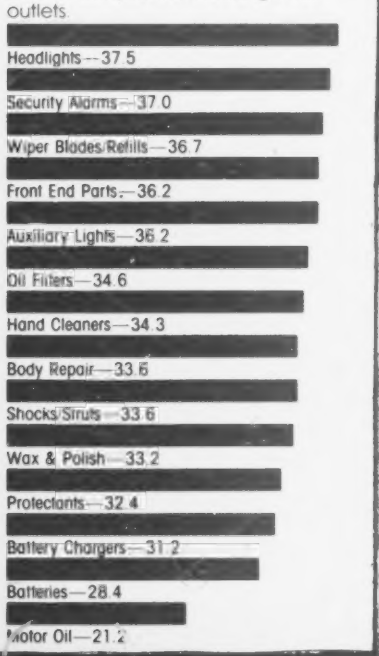
And, the companies they represent are a true cross section of the aftermarket. Volume retailers, companies selling 60% or more retail rather than wholesale, made up 43% of all respondents. By chain size, small chains, with three or fewer stores, made up 59% of respondents. Medium-sized chains, with three to 15 stores, made up 22% of respondents. Large chains, with more than 16 but fewer than 50 stores, made up 5% of all respondents. The remaining 15%—the megachains—had 51 or more stores.

The average chain that responded owned ten stores; this would seem typical for aftermarket retailing chains, according to information gathered for the annual *Automotive Marketing* Top 100 Retailers list (see this issue, page 61).

We organized the study results by different respondent categories. First, a category for chains with 60% or more of all their sales being retail rather than wholesale—volume retailers. Second, we compared chains

PRODUCTS BY GROSS MARGIN PERCENTAGE

Gross margin percentage is the total amount above cost the retailer charges. The following products are listed by the mean gross margin percentage indicated by all automotive product-stocking retail outlets.



PRODUCTS BY SQUARE FOOTAGE

Square footage of display space is the amount of square footage in the chain's average store given over to the individual product. The following products are listed by the mean square footage of display space in all automotive product-stocking retail outlets.

by size; small (three or fewer stores, medium (four to 15 stores), large (16 to 50 stores), and mega (51 or more stores). Then we divided chains by the average square footage in their stores; small (2,000 or fewer square feet), medium (two to 5,000 sq. ft.), and large (5,000 or more square feet).

We divided respondents by the total number of automotive SKUs they stocked. Chains reporting 4,999 or fewer automotive SKUs tend to be either very small stores or departments of general merchandise chains, with fast moving inventories of popular items. Chains reporting 5,000 to 13,999 automotive SKUs are typical aftermarket retail chains. Chains reporting 14,000 or more automotive SKUs tend to be jobber/retailers.

We also considered those chains that reported having service bays to be professional service providers. Before making the study, we believed that their stocking and selling patterns would be different than companies without professional service. Overall, we found that our belief was true.

Finally, we have provided a glossary with each product page to help you keep track of our respondent categories.

What We Found

On the whole, our study confirmed some basic facts about the aftermarket and the products sold through it:

- Chains with few SKUs of aftermarket products tend to have fewer SKUs in each product category, but have more turns and smaller gross margins.
- Bigger chains have fewer SKUs of individual products, on the average, than smaller chains.
- The more automotive SKUs the average store stocks, the more display space it allocates to automotive products.
- Service providers have generally higher margins on individual products than those chains without service.

So, here are some benchmark numbers from the aftermarket—numbers from big stores and little stores, numbers from chains with only a few stores and chains with many stores. You can use the numbers presented here, by product category, to compare how your operation does selling specific products to how the industry is doing as a whole. ■

SECURITY

Almost 20% of all retail chains report that they stock some sort of security products. As would be expected, the larger retailers stock a greater percentage of these high-margin products, with the mega chains being 30% more likely to stock security alarms than any other retailers.

SKUs

- Volume retailers stock, on average, one SKU of security alarms in their average store.
- Almost 20% of all retailers report that they stock security products. These retailers are primarily those with the largest square footage of display space and are the megachains.

Turns

- Retailers do, on average, three annual turns of security alarms in their average store.
- Among stores stocking security alarms, some 72% of small- and medium-sized chains report between two and four turns per year while 100% of large-sized chain retailers report two to four turns.
- The number of turns has little to do with the amount of SKUs of security products a store carries. Regardless of the amount of SKUs stocked, over 50% of all retailers selling security alarms report two to four turns per year.

Square Footage

- Some 65% of retailers report alloting between one and five square feet of display space to security alarms in their typical store.
- The greatest amount of square footage devoted to security alarms is almost 24 sq. ft. in medium-sized chain stores.
- The least amount is little more than three square feet and was reported by independently-owned jobbers. Next, alloting only five square feet of space, are those retailers with between 2,000 and 5,000 sq. ft. of automotive products.

Gross Margins

- Overall, retailers gross an average of 37% on security alarms.
- Undoubtably, because there are so few stores that carry security alarms, the margins can vary greatly. • By far the highest margin on security alarms is reported by discount auto stores at 50%.The lowest margin is reported by independent auto parts accessory chains at 31%.

Professional Services

- Retailers with service that sell security alarms report on average that they stock one SKU, have three turns annually, provide six square feet of display space, and have a gross margin of almost 36%. ■

Glossary

Volume Retailers: 60% or more DIY sales

Chains:
Small = 3 or fewer stores.
Medium = 4 to 15 stores.
Large = 16 to 50 stores.
Mega = 51 or more stores.

Stores by square footage:
Small = 2,000 or less square feet.
Medium = 2-5,000 square feet.
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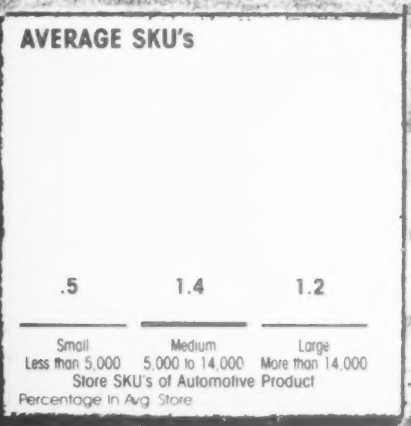
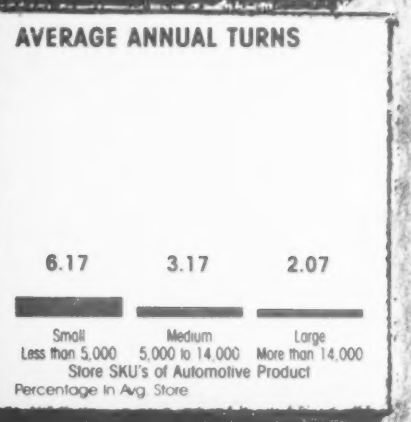
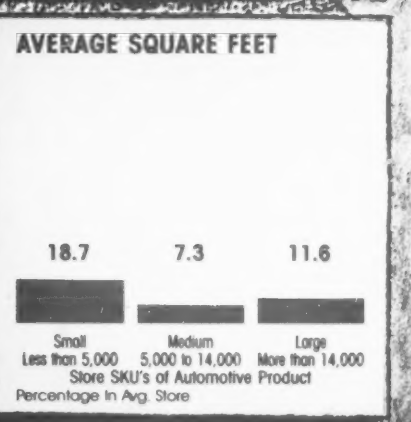
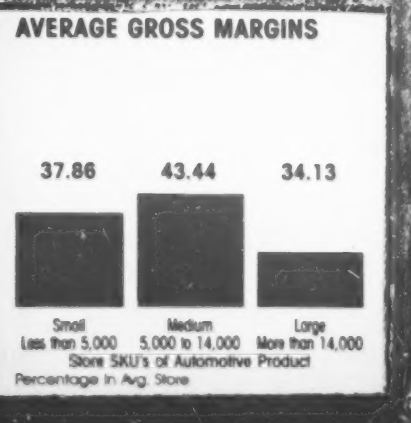
Total SKUs:
Small = 4,999 or fewer total automotive SKUs.
Medium = 5,000-13,999 total automotive SKUs.
Large = 14,000 or more total automotive SKUs.

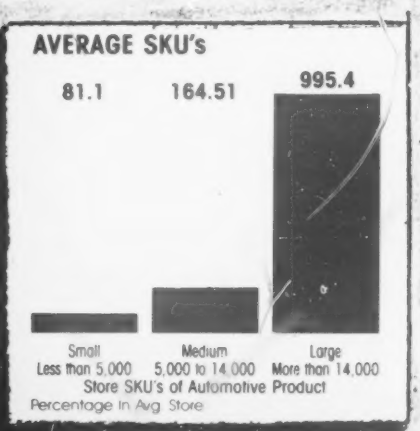


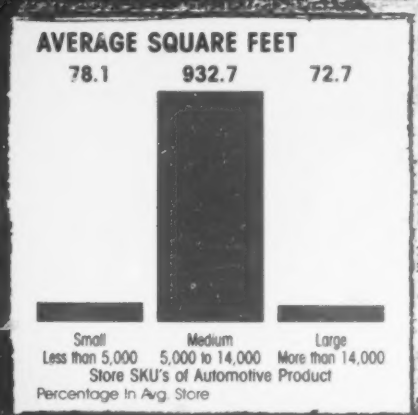






OIL FILTERS





Virtually every type of retailer that sells automotive products sells oil filters. Only 2% of all retailers report they don't stock oil filters. These stores apparently include stores which only devote a small amount of their inventory to automotive products, such as grocery and discount chains.

SKUs

- Almost half, 49%, of retailers stock over 90 SKUs of oil filters in their average store.
- Volume retailers stock an average of 114 oil filter SKUs.
- Retailers stocking under 5,000 automotive SKUs stock an average of 81 oil filter SKUs.
- Megachains stock an average of 115 oil filter SKUs.

Turns

- Retailers do, on average, eight annual turns of oil filters in their average store.
- The types of retailers which do better than average turns on oil filters are small chains, volume retailers, service providers, and chains which stock between 5,000 and 14,000 SKUs.
- Retailers making 60% or more of their total sales to DIYers do an average of nine turns, well above average.
- In all, 54% of chains with three or fewer stores do five or fewer turns of oil filters.

Square Footage

- Just under half, 43%, of retailers devote between 20 and 100 sq. ft. of display space to oil filters in their average store.
- Among chains with fewer than 2,000 sq. ft. devoted to automotive products, 42% devote 21 or more square feet to oil filters in their average store.
- Among chains with 2,000 to 5,000 sq. ft. devoted to automotive products, 51% allot between 31 and 300 sq. ft. to oil filters.
- Of chains with more than 5,000 sq. ft. devoted to automotive products, 52% allot between 30 and 500 sq. ft. to oil filters.

Gross Margins

- Overall, retailers gross an average margin of 35% on oil filters.
- No single type of chain, when organized by chain size, square footage, SKUs stocked, or volume retailers, does significantly better in terms of gross margins than any other type of chain when it comes to oil filters.

Professional Service

- Providers of professional service stock fewer oil filter SKUs than the average of 146 SKUs.
- Service providers do more turns of oil filters than average, ten vs. eight.
- Service providers devote an average of 94 sq. ft. of space to oil filters.
- The average gross margin on oil filters reported by service providers, 36%, is nearly the same as average, 35%. ■

Glossary

Volume Retailers. 60% or more DIY sales.

Chains:
Small = 3 or fewer stores.
Medium = 4 to 15 stores.
Large = 16 to 50 stores.
Mega = 51 or more stores.

Stores by square footage:
Small = 2,000 or less square feet.
Medium = 2,001-5,000 square feet.
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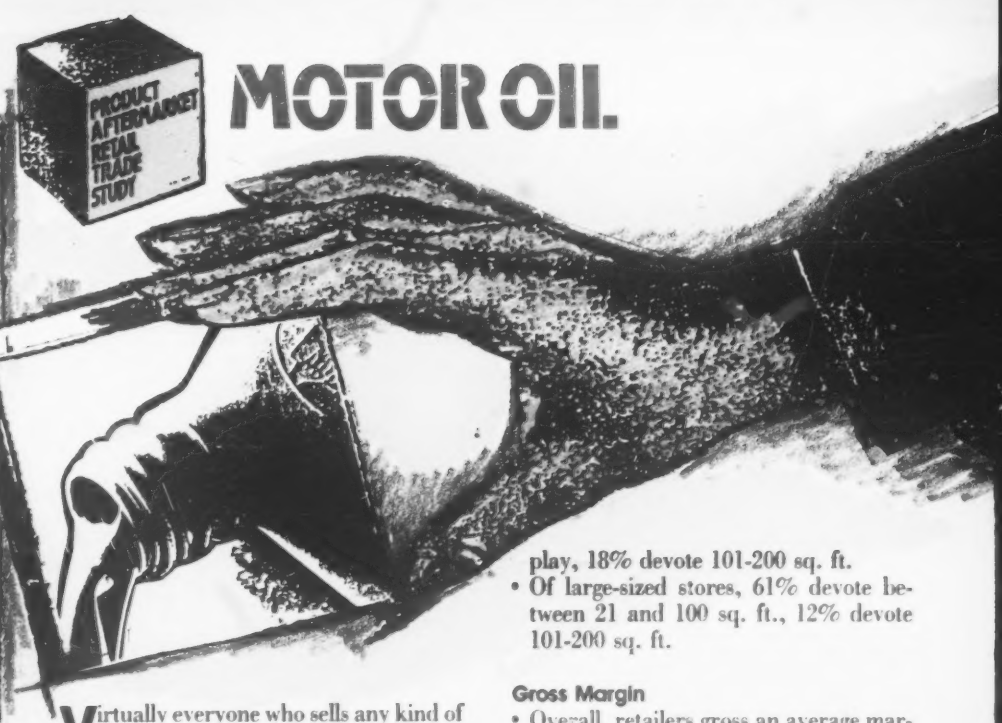
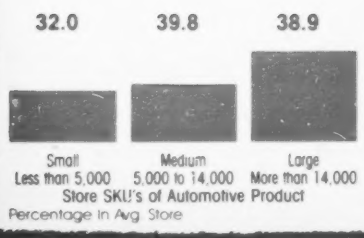
Total SKUs:
Small = 4,999 or fewer total automo
Medium = 5,000-13,999 total autom
[illegible]4,000 or more total auto

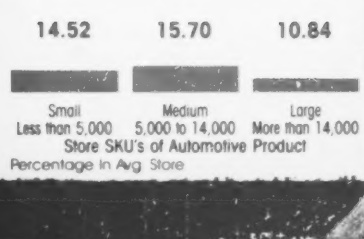
MOTOR OIL.



AVERAGE SKU's



AVERAGE ANNUAL TURNS



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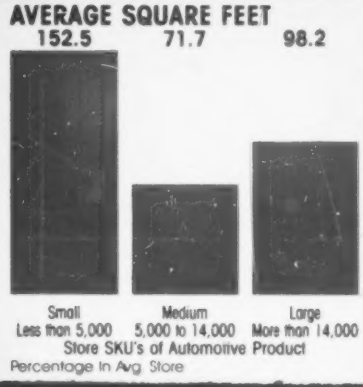
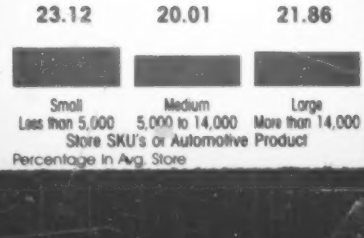


AVERAGE GROSS MARGINS



Virtually everyone who sells any kind of automotive product – from megachains to small chains – sells motor oil. This must-sell product occupies shelf space – from two to 102 sq. ft. – and makes a profit for those who sell it – from 5% to 50% – at every level.

SKUs

- Retailers stock, on average, 44 SKUS of motor oil in their average store.
- Of small-sized chains, 65% carry between one and 20 SKUs of motor oil. The most common range for small chains is 21 to 30 SKUs at 10%
- Of medium-sized chains, 40% carry between one and 20 SKUs of motor oil. The most common range for medium chains is 21 to 40 SKUs carried by 35%.
- Of large chains, 36% carry between one and 20 SKUs of motor oil. The most common range of SKUs carried by large chains is 20 to 30 by 27%

Turns

- Retailers do, on average, 14 annual turns of motor oil in their average store.
- The highest numbers of turns done by small chains is 21 or more done by 11%.
- The highest numbers of turns done by medium chains is six done by 13%.
- The highest numbers of turns done by large chains is four done by 16%.

Square Footage

- Typically, 102 sq. ft of display space is devoted to motor oil in retailers' average stores.
- Of small-sized stores, 40% devote between two and 20 sq. ft. of display space to motor oil, 15% devote 101-200 sq. ft.
- Of medium-sized stores, 57% devote between 21 and 100 sq. ft. to motor oil display, 18% devote 101-200 sq. ft.
- Of large-sized stores, 61% devote between 21 and 100 sq. ft., 12% devote 101-200 sq. ft.

Gross Margin

- Overall, retailers gross an average margin of 21% on motor oil.
- Some 68% of small stores have a gross margin on motor oil of between 5% and 25%, while 5% get 51% or more.
- Some 84% of medium stores have a gross margin on motor oil between 5% and 25%, while 2% get 51% or more.
- Some 74% of large stores have a gross margin on motor oil between 5% and 25%.

Professional Service

- Of retailers who provide service, 59% carry between one and 20 SKUs of motor oil.
- Some 69% of service providers have between one and 15 turns on motor oil annually, 13% have 16 to 20 turns annually, and another 13% have 21 or more turns annually.
- Some 43% of stores with service bays devote between two and 20 sq. ft. of display space to motor oil.
- Some 64% of stores that provide service have a gross margin on motor oil of between 5% and 25%, 23% have between 26% and 50%, and 9% have 51% or greater gross margin. ■

Glossary

Volume Retailers: 60% or more DIY sales

Chains:
Small = 3 or fewer stores.
Medium = 4 to 15 stores.
Large = 16 to 50 stores.
Mega = 51 or more stores.

Stores by square footage:
Small = 2,000 or less square feet.
Medium = 2,001-5,000 square feet.
Large = More than 5,000 square feet.

Total SKUs:
Small = 4,999 or fewer total automotive SKUs.
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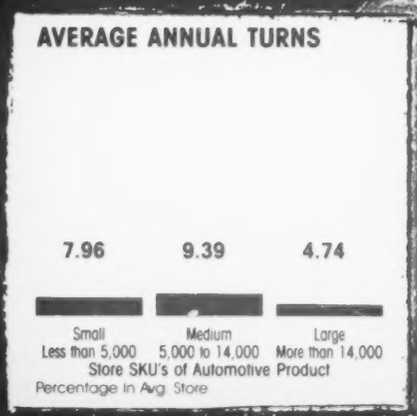
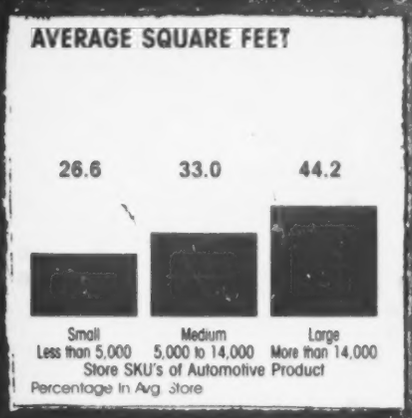
WAX & POLISH





At least 93% of retailers who sell automotive products sell waxes and polishes. Megachains, chains with more than 51 stores, stock the most SKUs of waxes and polishes while volume retailers report the highest turns. The amount of typical display space devoted to this category varies greatly while the gross margin percentage rate remains relatively stable for all retailers at around 32-36%.

SKUs

- On average, retailers stock 30 SKUs of wax and polish in their average store.
- However, there is a large diversity between different sized chains. The chains with fewer than three stores report, on average, stocking 26 SKUs of wax and polish, while chains with more than 51 stores stock 86 SKUs.
- The chains with three to 15 stores report, on average, stocking 25 SKUs.
- Not surprisingly, it is the stores with the most overall square footage devoted to automotive products that stock the most – over 50 – SKUs of wax and polish.

Turns

- Retailers do, on average, seven annual turns of wax and polish in their average store.
- The volume retailers report the highest turns at an average of eight each year while megachains report the lowest average turns of four.
- The largest numbers of turns is reported by the discount stores at 15.
- A full 43% of retail chains with fewer than three stores report average turns between three and four. The similairty between the smallests chains and the megachains indicates that the size of the retail chain has little to do with the amount of turns.

Square Footage

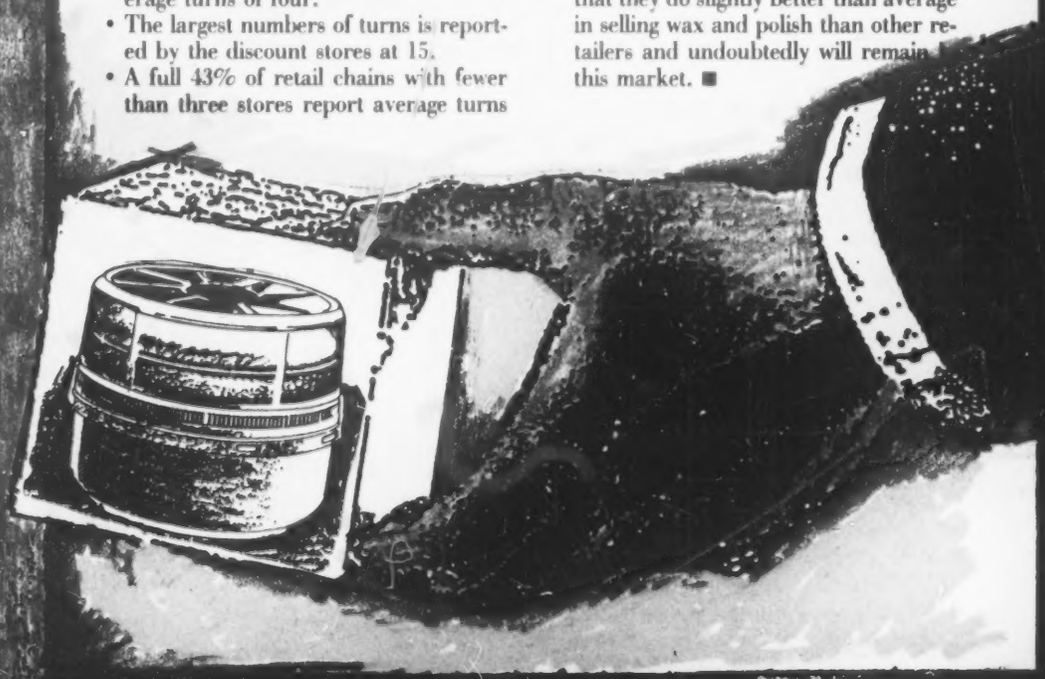
- Typically, 34 sq. ft. of display space is devoted to wax and polish in the retailers' average stores.
- At least half, 52%, of the stores with over 5,000 sq. ft. of automotive products provide more display space to wax and polish, anywhere up to 300 sq. ft.
- In all, 74% of the small-sized chains – those with fewer than three stores – allot less square footage than the average retailer.

Gross Margins

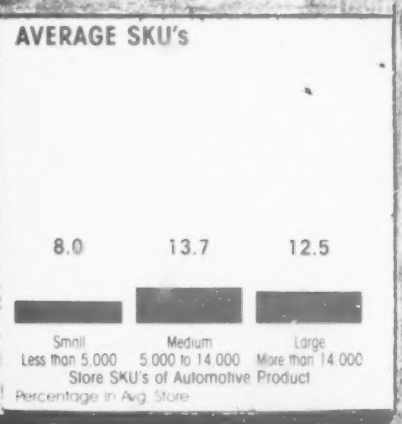
- Overall, retailers gross an average of 33% on wax and polish.
- The lowest gross margin was reported by independently-owned auto parts accessory chains at 32%.
- The highest gross margin was reported at almost 36% by stores with 5,000 to 14,000 total SKUs.

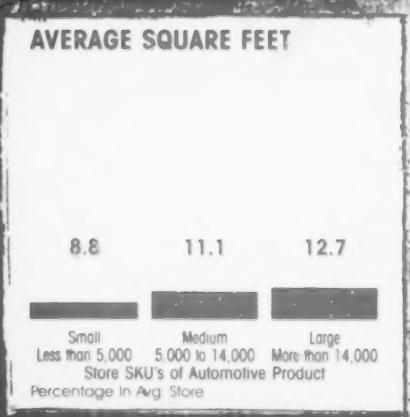
Professional Service

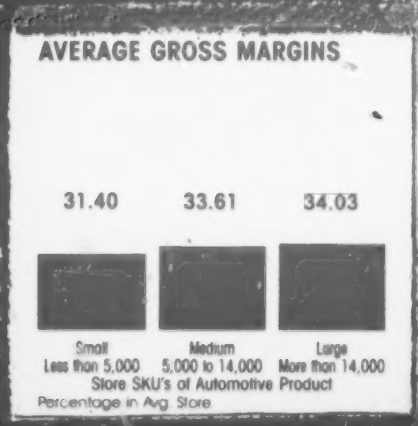
- Service providers that sell wax and polish report that, on average, they have a gross margin of 32%, stock 30 SKUs, have eight turns, and allot 23 sq. ft. of space for their display. This indicates that they do slightly better than average in selling wax and polish than other retailers and undoubtedly will remain in this market. ■



PROTECTANTS







Almost all, 93%, of automotive retailers sell protectants in their stores. In general, the protectant market is steady with retail chains of three or fewer stores stocking on average almost the same amount (within 2%) of protectant SKUs as megachains. In addition, on average, the amount of square footage alloted to protectants also varies only 2% between small and megachains.

SKUs

- On average, retailers stock 11 SKUs of protectants in their typical store.
- The total automotive SKUs a store carries doesn't appear to make a vital difference in how many SKUs of protectants each store stocks. Stores that stock over 14,000 automotive SKUs actually carry slightly fewer SKUs of protectants than stores with between 5,000 and 13,999 automotive SKUs—they stock almost 14 SKUs of protectants.
- The greatest difference is with the stores that stock less than 5,000 automotive SKUs. These stores stock, on average, at least five fewer SKUs of protectants than the medium-sized stores do.

Turns

- Retailers do, on average, eight annual turns of protectants in their average stores.
- Typically, volume retailers whose business is over 60% retail do ten turns each year.

Square Footage

- Typically, 12 sq. ft. of display space is devoted to protectants in the retailers' average stores.
- Some 77% of retail chains with less than three stores allot less space to protectants than that, while 93% of retail chains with more than 51 stores also allot less space.
- Some 73% of stores with 5,000 or more total automotive SKUs devote more than 12 sq. ft. of space to protectants.

Gross Margin

- Overall, retailers gross an average of 33% on protectants.
- Stores with more than 14,000 total automotive SKUs report a slightly higher gross margin of 34%, and stores with less than 5,000 automotive SKUs report a slightly lower gross margin of 31%.
- The lowest gross margin of all is reported by discount stores at 29%.

Professional Service

- Retailers which provide professional service surprisingly carry more SKUs of protectants than average, have higher annual turns, use more display space, but have the same average gross margin of 33% for protectants.

Glossary

Volume Retailers: 60% or more DIY sales

Chains:
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Medium = 4 to 15 stores.
Large = 16 to 50 stores.
Mega = 51 or more stores.

Stores by square footage:
Small = 2,000 or less square feet.
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Large = More than 5,000 square feet.

Total SKUs:
Small = 4,999 or fewer total automotive SKUs.
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BATTERIES

Virtually every automotive products retailer sells batteries. An overwhelming 95% of retailers who sell automotive aftermarket products also stock at least one battery SKU. However, smaller stores were less likely to stock batteries than larger stores. For example, 97% of chains with 14,000 or more SKUs per store and 90% of chains with average stores with less than 4,999 SKUs stock batteries.

SKUs

- Retailers stock, on average, 35 SKUs of batteries in their average store.
- Stores carrying more than 14,000 total SKUs stock, on the average, 53 SKUs of batteries, more than any other type of store.
- Stores carrying less than 4,999 SKUs, on the other hand, stock only 22 SKUs of batteries on the average.

Turns

- Retailers do, on average, eight annual turns of batteries in their average store.
- Turns vary by store type. For the typical retailer, stocking between 5,000 and 14,000 SKUs, the average store does a little over ten turns in batteries per year.
- Stores selling more than 60% retail also do better than average with battery sales with just less than ten turns per year.

Square Footage

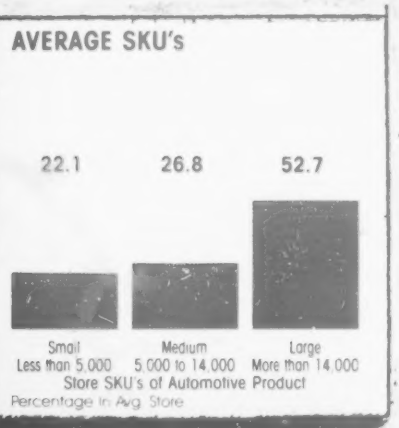
- Typically, 36 sq. ft. of display space is devoted to battery products in retailers' average stores.
- Less than one third, 30%, of all retailers, however, devote ten or fewer square feet of display space to batteries.
- Stores with more than 5,000 sq. ft. devote no more space to battery displays than do stores with less than 2,000 sq. ft. Both give about 30 sq. ft. of display space to batteries.
- The display space devoted to batteries among retailers who have retail sales of 60% or more is 33 sq. ft.

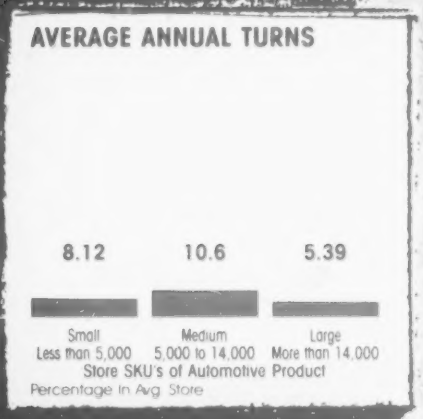
Gross Margins

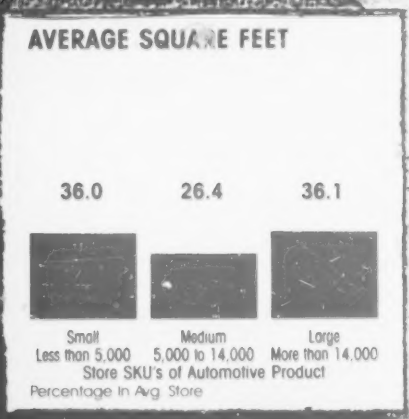
- Overall, all retailers, including jobbers, gross an average margin of 28% on batteries.
- Of retailers selling more than 60% retail, the average gross margin is 30% on batteries.
- There is virtually no difference in terms of gross margins among any of the types of stores surveyed.

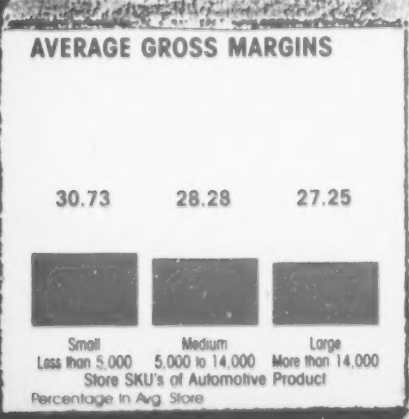
Professional Service

- Retailers that provide professional service do about the same in the battery category as those without service. In fact, only 6% of chains with professional service don't stock batteries.
- Among service providers, the average number of battery SKUs stocked by service professionals is 33; the average square footage devoted to their display is 44; the average gross margin is 29%; the average number of turns is 11. ■









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Total SKUs:
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= 14,000 or more total automo

WIPER BLADES/REFILLS

Virtually every type of retailer that sells automotive products sells windshield wipers or blades. Only 3% of all retailers report they don't stock wipers or refills. These chains are apparently representative of chains which only devote a small amount of their inventory to automotive products, such as grocery and discount chains.

SKUs

- Retailers stock, on average, 56 SKUs of wiper blades or refills in their average store.
- The smallest and largest chains stock more SKUs, on average, than medium-sized chains. Chains with three or fewer stores stock an average of 62 wiper or refill SKUs, while those with 51 or more stores stock 69 SKUs. Medium-sized chains stock an average of 36 wiper or refill SKUs.
- In all, 51% of chains with three or fewer stores stock four or fewer SKUs of wipers or refills.

Turns

- Retailers do, on average, seven annual turns of windshield wipers or blades in their average store.
- The types of retailers which do significantly better than average turns of wiper blades or refills are small chains, chains with stores with small average footage, and chains which stock between 5,000 and 14,000 SKUs.
- Retailers doing 60% or more of their total sales to DIYers do an average of nine turns, well above average.

Square Footage

- Over half, 56%, of retailers devote ten or fewer square feet of display space to wiper blades or refills in their average store.
- Among chains with fewer than 2,000 sq. ft. devoted to automotive products, 51% devote six or fewer square feet to wiper blades or refills in their average store.
- Among chains with 2,000 to 5,000 sq. ft. devoted to automotive products, 50% devote between four and 12 sq. ft. to wiper blades or refills.
- Of chains with more than 5,000 sq. ft. devoted to automotive products, half devote between eight and 30 sq. ft. to wiper blades or refills.

Gross Margins

- Overall, retailers gross an average margin of 37% on wiper blades and refills.
- Megachains have higher average gross margins, 43%, than other types of chains on wiper blades and refills.

Professional Service

- Providers of professional service stock fewer wiper blade or refill SKUs than average.
- Service providers do more turns, nine, of wiper blades or refills than average.
- Service providers give an average of 11 sq. ft. to wiper blades or refills.
- The average gross margin on wiper blades or refills reported by service providers, 37%, is the same as the average. ■

Glossary
Volume Retailers: 60% or more DIY sales.

Chains:
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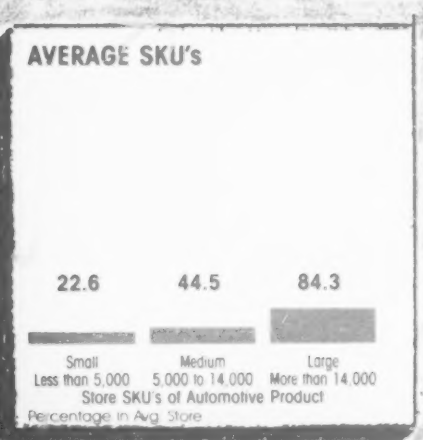
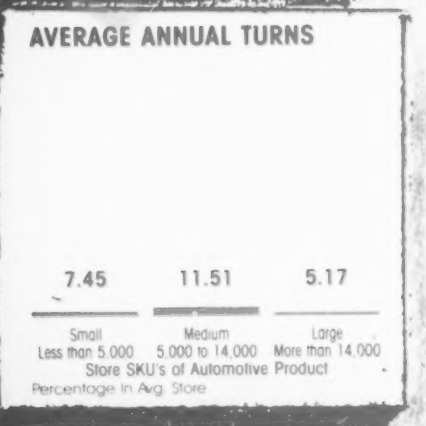
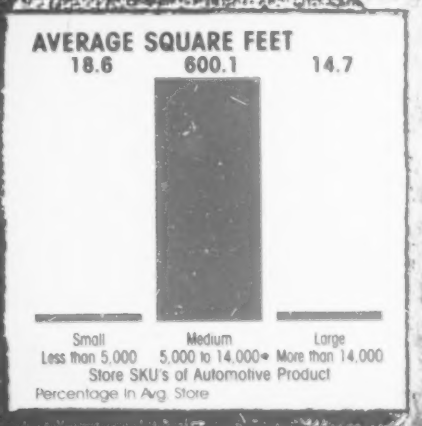
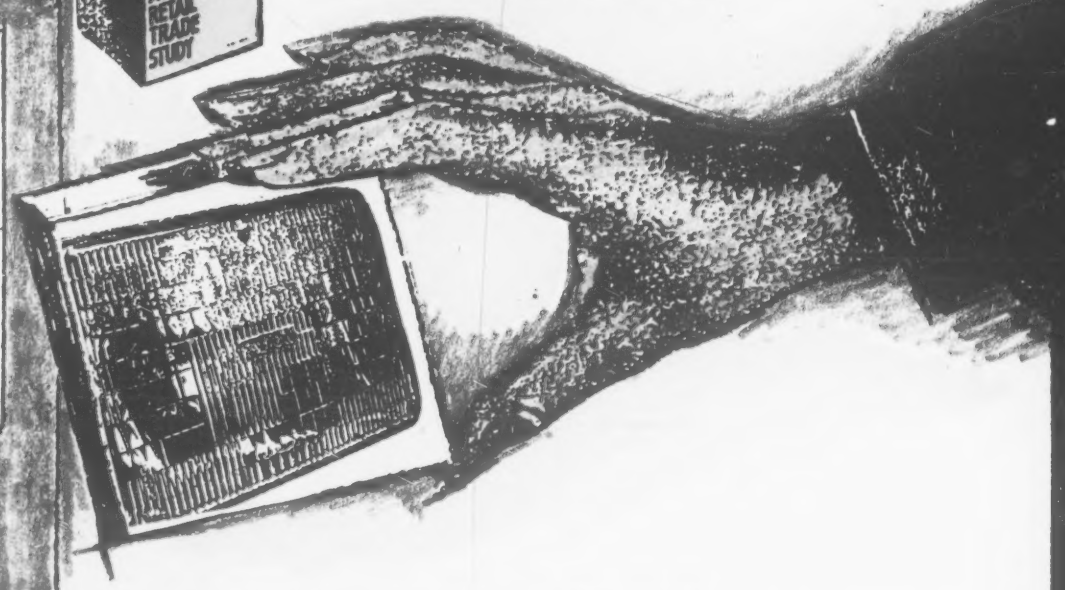


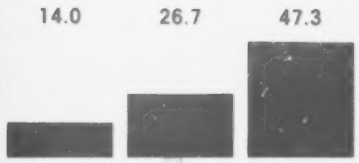




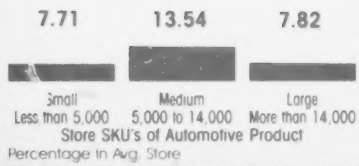
HEADLIGHTS



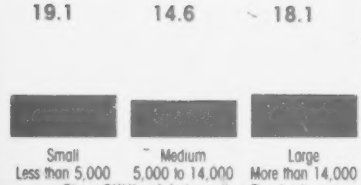
AVERAGE SKU's



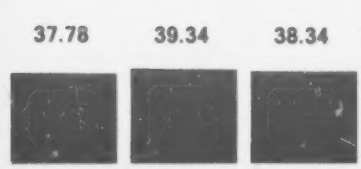
AVERAGE ANNUAL TURNS



AVERAGE SQUARE FEET



AVERAGE GROSS MARGINS



There are no absolutes when it comes to headlights stocked in retail chain stores. But, headlights are an important and necessary product for all retailers, including service providers, because there is an immediate demand for replacement when they fail.

SKUs

- Retailers stock, on average, 30 SKUs of headlights in their average store.
- On average, the stores with the most square footage as well as the stores with the greatest number of overall SKUs stock the greatest number of headlight SKUs.

Turns

- Retailers do, on average, nine annual turns of headlights in their average store.
- Some 67% of the large- and mega-sized retail chains do the best business – they report annual turns as high as ten.
- Some 64% of the small-sized chains turn headlights between two and six times a year, while 56% of medium-sized chains do the same.

Square Footage

- Typically, 19 sq. ft. of display space is devoted to headlights in retailers' average store.
- Headlight displays are reported to range anywhere from one to 300 sq. ft. of space with the largest stores (by overall square footage devoted to automotive products) allotting more space.

Gross Margins

- Overall, retailers gross an average margin of 38% on headlights.
- The chains with between three and 15 stores report the highest gross margin at almost 40%. The lowest was 33%, reported by discount stores.

Professional Services

- Retail chains which provide service, on the average, have 21 SKU's of headlights in stock, have almost nine annual turns, allot almost 15 sq. ft. of display space, and have a gross margin of 37% on headlights. ■

Glossary

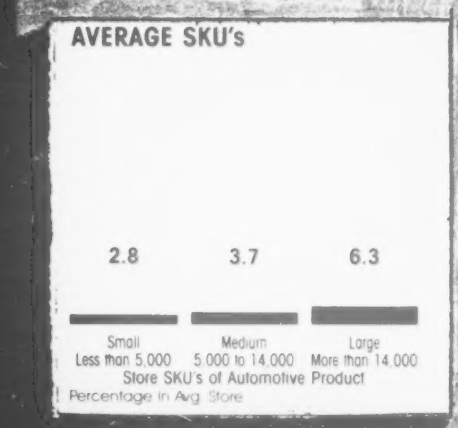
Volume Retailer: 60% or more DIY sales

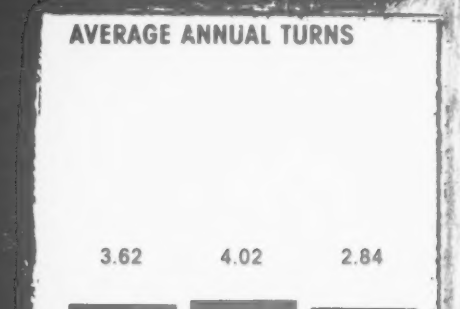
Chains:
Small = 3 or fewer stores.
Medium = 4 to 15 stores.
Large = 16 to 50 stores.
Mega = 51 or more stores.

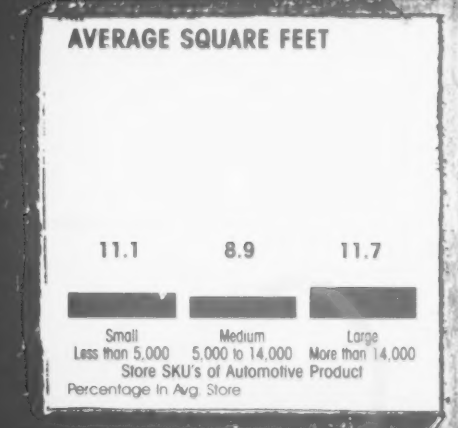
Stores by square footage:
Small = 2,000 or less square feet.
Medium = 2-5,000 square feet.
Large = More than 5,000 square feet.

Total SKUs:
Small = 4,999 or fewer total automotive SKUs.
Medium = 5-13,999 total automotive SKUs.
Large = 14,000 or more total automotive SKUs.

BATTERY CHARGERS







The great majority of automotive products retailers sell battery chargers. In all, 77% of retailers that sell automotive aftermarket products stock battery chargers.

SKUs

- Retailers stock, on average, four SKUs of battery chargers in their average store.
- Most stores stock between three and six SKUs of battery chargers. However, exactly half the small chains with less than three stores do not carry any, or carry two or fewer SKUs of battery chargers.

Turns

- Retailers do, on average, three annual turns of battery chargers in their average store.
- For the typical retailer stocking between 5,000 and 14,000 SKUs, 38% report more than three turns annually.
- Some 34% of small retailers, stocking 4,999 or fewer SKUs of automotive products, do more than three annual turns.
- Only 20% of jobber/retailers stocking more than 14,000 SKUs had more than three annual turns.

Square Footage

- Typically, ten square feet of display space is devoted to battery chargers in retailers' average stores.
- Chains with larger stores don't act consistently in terms of how much space is devoted to battery chargers.
- Discounters give more space, 13 sq. ft. on the average, to battery chargers than any other type of store.
- On the average, retailers with smaller stores, less than 2,000 sq. ft. of autootive products, devote, more space to displaying battery chargers than retailers with stores of 2-5,000 sq. ft.
- The space devoted to battery chargers among retailers who have retail sales of 60% or more is ten square feet.

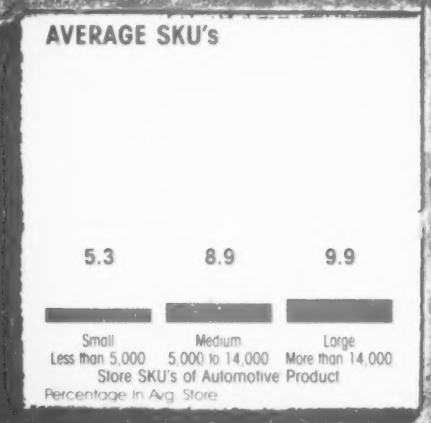
Gross Margins

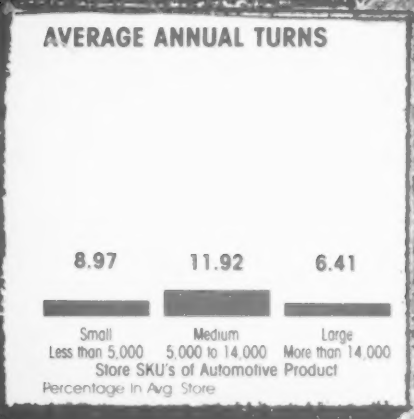
- Overall, retailers gross an average margin of 31% on battery chargers.
- In all, 56% report gross margin percentages ranging between 26% and 35%.
- Of volume retailers, 42% report gross margin percentages of 31% to 40%.
- Battery chargers are less profitable for independent auto parts chains compared to other types of stores, with a third reporting gross margins on battery chargers under 25%.
- Megachains do better, with half reporting that gross margins on battery chargers are over 36%.

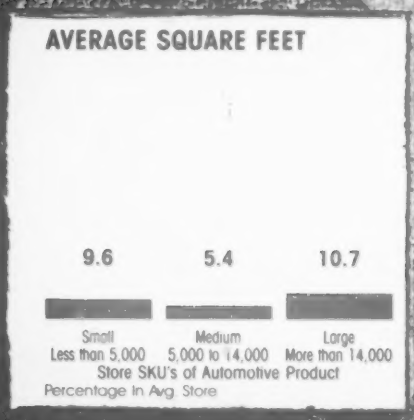
Professional Service

- Retailers that provide professional service did not do better in this product category than those without service. In fact, 39% of chains with professional service don't stock battery chargers.
- Among service providers, the average number of battery chargers SKUs stocked by service professionals is four; the average display space devoted to battery chargers is 11 sq. ft.; the average gross margin is 30%; the average number of annual turns is three. ■

HAND CLEANERS







Almost one third all retail chain stores stock more than six SKUs of hand cleaners making this product a popular one for retail shelves. However, the larger chains seem to be outdone by the smaller chains when it comes to selling hand cleaners.

SKUs

- Retailers stock, on average, ten SKUs of hand cleaners in their average store.
- Some 67% of small-sized retail chain stores stock between one and six SKUs of hand cleaners while 75% of medium-sized retail chain stores stock between one and ten SKUs of hand cleaners. And, 80% of the large- and 71% of the megachains stock between one and ten SKUs.
- Of all small retail stores – those with 5,000 total SKUs – 55% stock between one and three SKUs of hand cleaners, while over 50% of both medium- sized and large-sized retailers report stocking two through six SKUs of hand cleaners.

Turns

- Retailers do, on average, eight turns of hand cleaners in their average store.
- Small-sized retail chains report an annual turn mean of nine, while large and megachains report only seven, and sometimes as low as four annual turns.
- There is no set pattern as to whether or not providing the customer with a greater variety of products – more SKUs – changes the annual turns. Regardless of whether a chain has less than 5,000 SKUs or more than 14,000 SKUs, the average turn rate of hand cleaners hovers between six and nine.

Square Footage

- Typically, nine square feet of display space is devoted to hand cleaners in retailers' average stores.
- Some 78% of both small- and medium-sized retail chain stores devote between one and ten square feet of display space for hand cleaners while only 85% of both large and megachains do the same.
- A small-sized retail chain store with approximately 5,000 total SKUs and a medium-sized retail chain store with 5,001 to 14,000 total SKUs stock at least two-thirds of their hand cleaners within eight square feet of display space.

Gross Margins

- Overall, retailers gross an average margin of 34% on hand cleaners.
- Megachains report the highest gross margin at 39% while stores with less than 2,000 sq. ft. of space report the lowest at 33%.

Professional Service

- On average, service providers allot six square feet of display space, stock almost ten hand cleaners SKUs, report almost 11 annual turns, and have an overall gross margin of 33%. Although service providers do not allot as much space to hand cleaners as other retailers do, they appear to be quite successful at selling it. ■

Glossary

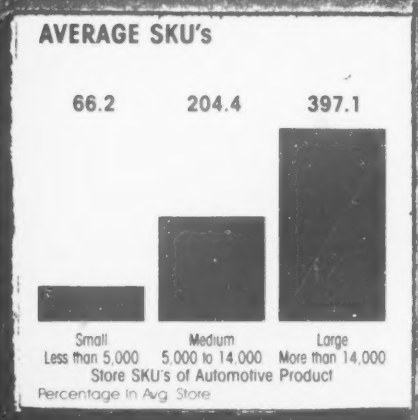
Volume Retailers: 60% or more DIY sales

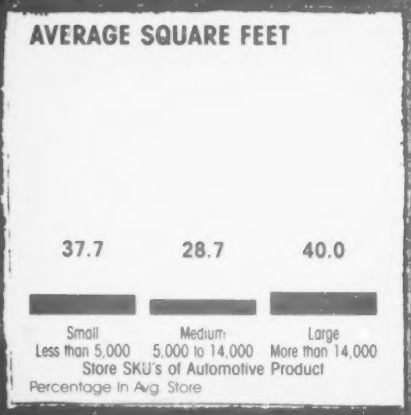
Chains:
Small = 3 or fewer stores.
Medium = 4 to 15 stores.
Large = 16 to 50 stores.
Mega = 51 or more stores.

Stores by square footage:
Small = 2,000 or less square feet.
Medium = 2,001-5,000 square feet.
Large = More than 5,000 square feet.

Total SKUs
Small = 4,999 or fewer total automotive SKUs.
Medium = 5,000-13,999 total automotive SKUs.
Large = 14,000 or more total automotive SKUs.

FRONT END PARTS





Front end parts are sold by virtually every automotive products retailer. In all, 87% of retailers who sell automotive aftermarket products stock front end parts.

SKUs

- Over half, 52%, of retailers stock more than 90 SKUs of front end parts in their average store.
- But the number of SKUs stocked increases by the size of the chain. Chains with fewer than three stores stock 183 SKUs of front end parts on the average, while megachains stock 261 SKUs on average in their stores.
- On the other hand, discounters typically stock only 13 SKUs of front end parts.

Turns

- Retailers do, on average, five annual turns of front end parts in their average store.
- Turns vary widely by the number of front end parts SKUs stocked. For the chain stocking on the average only 66 SKUs of front end parts, average turns are eight per year.
- But for stores averaging 397 SKUs of front end parts, average turns decline to three per year.
- Only 34% of high volume retailers get more than three turns per year from front end parts.

Square Footage

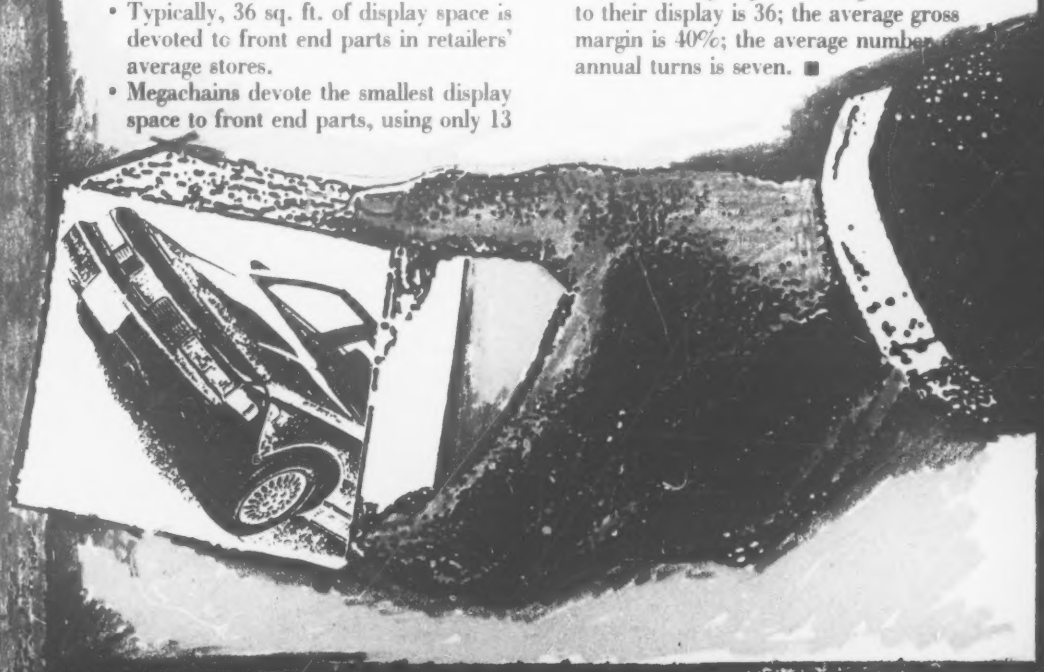
- Typically, 36 sq. ft. of display space is devoted to front end parts in retailers' average stores.
- Megachains devote the smallest display space to front end parts, using only 13 sq. ft. on the average for the category.
- Some 11% of small-sized retail chains give 20 to 30 sq. ft. of display space to front end parts.
- Stores with more than 2,000 sq. ft. of automotive products devote about the same amount of space to display front end parts as does the average store.
- But chains with stores of less than 2,000 sq. ft. give just 32 sq. ft. on the average for the display of front end parts.
- The average space devoted to front end parts among retailers who have retail sales of 60% or more is 34 sq. ft.

Gross Margins

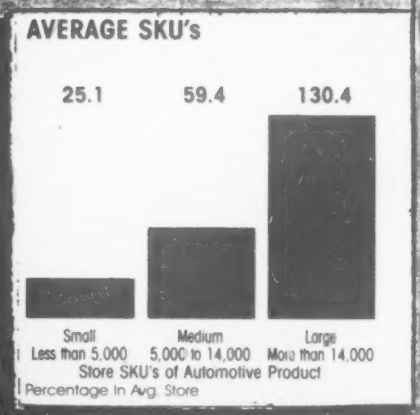
- Overall, all retailers, including jobbers, gross an average margin of 36% on front end parts.
- In all, 70% report gross margins of 31% or more.
- Of volume retailers, 53% report gross margins of 31% to 40%.
- Megachains do even better, reporting a typical gross margin of 46% on front end parts sales.

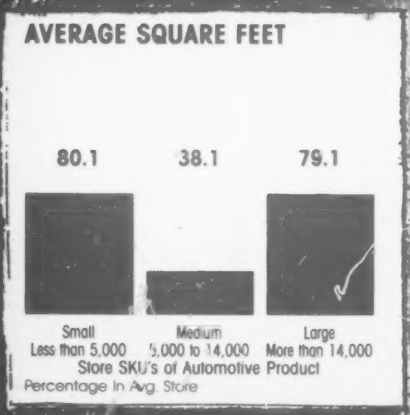
Professional Service

- Retailers that provide professional service do better in this product category than those without service. In fact, 83% of chains with professional service stock front end parts.
- Among service providers, however, the average number of front end parts SKUs stocked by service professionals is 97; the average square footage devoted to their display is 36; the average gross margin is 40%; the average number of annual turns is seven. ■



BODY REPAIR PRODUCTS





Almost every automotive products retailer sells body repair products. In all, 73% of retailers that sell in the automotive aftermarket stock body repair products.

SKUs

- Over half, 53%, of retailers stock 50 or fewer SKUs of body repair products in their average store.
- The number of SKUs stocked by various types of aftermarket chains—pure retailers, jobber/retailers, discount stores, etc.—varies tremendously. Discount stores stock as few as 11 SKUs on average, while auto parts and accessories chains typically stock 106 SKUs.

Turns

- Retailers do, on average, six annual turns of body repair products in their average store.
- Turns vary by store type. For the typical auto parts retailer stocking between 5,000 and 14,000 SKUs, 52% report three or four turns annually.
- Only 39% of retailers stocking 4,999 or fewer SKUs of automotive products, get three or four annual turns. The average annual turns for volume retailers are eight.
- Some 44% of retailers between 5,000 and 13,999 SKUs had three to four annual turns. The average for these retailers is eight annual turns.

Square Footage

- Typically, 60 sq. ft. of display space is devoted to body repair products in retailers' average stores.
- Over one third, 37%—the largest single block—devote ten or fewer square feet of display space to body repair products.
- The biggest single block of stores with less than 2,000 sq. ft. devoted to automotive products, 31%, devote 20 to 30 sq. ft. of display space to body repair products.
- The average square feet devoted to body repair products among retailers who have retail sales of 60% or more is 29 sq. ft.

Gross Margins

- Overall, all retailers, including jobbers, gross an average margin of 34% for body repair products. In all, 53% report gross margins between 26% and 35%.
- Of volume retailers, 52% report gross margins of 31% to 40%.
- Large-sized chains do even better, with 54% seeing gross margins average between 31% and 40%.

Professional Service

- Retailers that provide professional service do no better in this product category than those without service. In fact, 43% of chains with professional service don't stock body repair products.
- Among service providers, the average number of body repair product SKUs stocked by service professionals is 47; the average square footage devoted to their display is 48; the average gross margin is 33%; the average number of annual turns is six. ■

Glossary

Volume Retailer: 60% or more DIY sales

Chains:
Small = 3 or fewer stores
Medium = 4 to 15 stores
Large = 16 to 50 stores
Mega = 51 or more stores

Stores by square footage:
Small = 2,000 or less square feet
Medium = 2,001-5,000 square feet
Large = More than 5,000 square feet

Total SKUs:
Small = 4,999 or fewer total automotive SKUs
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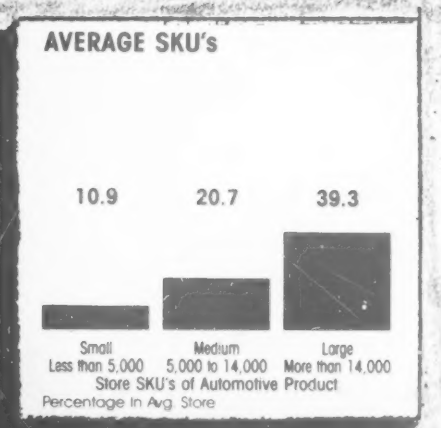
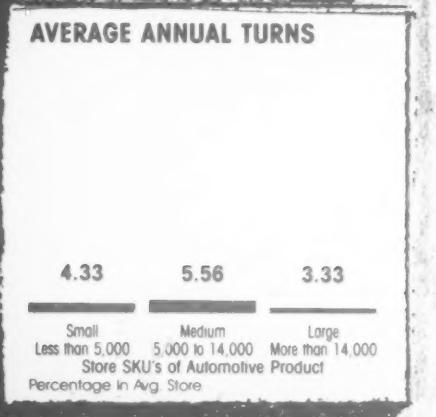
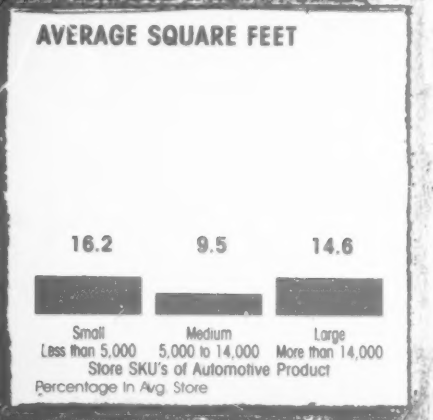
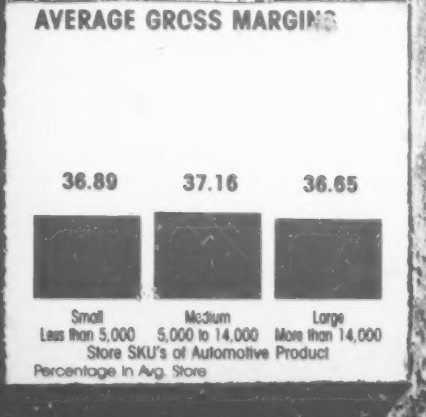
AUXILIARY LIGHTING









There is a direct stocking correlation among retailers that carry some kind of auxiliary lighting products—from fog lights to spotlights—on their shelves. Chains that stock more SKUs also carry the largest assortment of auxiliary lighting products, with an average of 39 SKUs compared with only 11 SKUs in chains with few overall automotive SKUs.

SKUs

- Retailers stock, on average, 24 SKUs of auxiliary lighting products in their average store.
- Over half, 59%, of all retailers with less than 5,000 total SKUs stock up to three SKUs of auxiliary lighting products.
- Stores with more than 5,000 total SKUs show no major trend toward stocking any specific number of SKUs of auxiliary lighting products.

Turns

- Retailers do, on average, four annual turns of auxiliary lighting products in their average store.
- At least 80% of small-sized retail chain stores, 77% of medium-sized chains, and 71% of large-sized chains report having an average of between one and four turns each year on auxiliary lighting products.
- Meanwhile, 100% of megachains report a slightly higher average of two to five turns each year.

Square Footage

- Typically, 16 sq. ft. of display space is devoted to auxiliary lighting products in retailers' average stores.
- Over half of all retail chain stores display up to ten square feet or from 21 through 50 sq. ft. of auxiliary lights, while 40% of retail stores report stocking between ten and 20 sq. ft.
- Over 59% of all auxiliary lighting SKUs are stocked in 10 sq. ft. of each store.

Gross Margins

- Overall, retailers gross an average of 36%. The highest margin, 41%, is reported by the megachains. The lowest is reported by the small chains of less than three stores at just under 36%.
- The gross margin range of 26% to 40% encompasses 68% of all retail chain stores that stock a total of less than 5,000 SKUs, and 76% of those retail chain stores that stock a total of 5,000 through 14,000 SKUs.

Professional Service

- Retail chains with service stock about 27 SKUs of auxiliary lights, report almost five turns annually, allot 19 sq. ft. of display space, and average an overall gross margin of almost 38%. ■

Glossary

Volume Retailers: 60% or more DIY sales.

Chains:
Small = 3 or fewer stores.
Medium = 4 to 15 stores.
Large = 16 to 50 stores.
Mega = 51 or more stores.

Stores by square footage:
Small = 2,000 or less square feet.
Medium = 2,001-5,000 square feet.
Large = More than 5,000 square feet.

Total SKUs:
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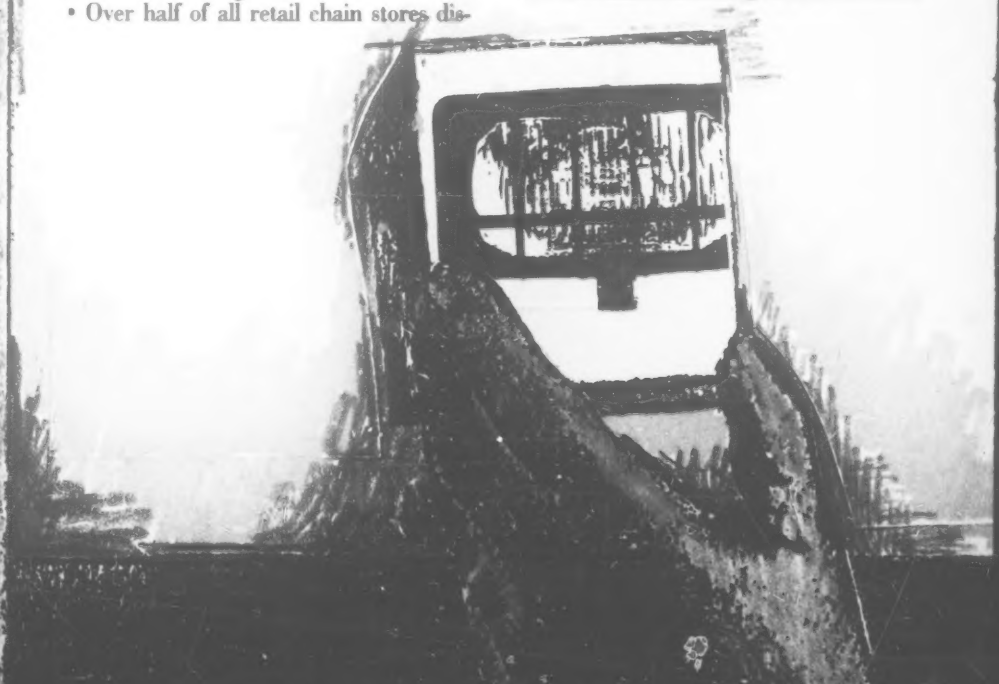

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TOP ONEHUNDRED

AM'S LARGEST AFTERMARKET RETAILERS

Today there are 8.4% more company-owned stores on our *Automotive Marketing* Top 100 retailer list than there were in 1988. The AM Top 100 is a list of the retail chains that concentrate on automotive parts, chemicals, and accessories sales to consumers. Then there were 6,135 stores this year vs. 5,656 stores on our August 1988 list. Between 1987 and 1988, the comparable growth was 6.6% more automotive parts stores. So, at least in terms of overall store number growth,

THE AM LARGEST 100 AFTERMARKET RETAILERS

Rank	Chain	# of Stores	# of Bays	$ Sales (+000)*	CEO	Address and Phone	1988 Rank
1.	Northern Automotive [1]	880	0	660,149	John S. Lacey	645 Missouri Ave., Suite 400, Phoenix, AR 85012 (602) 265-9200	1
2.	AutoZone	509	0	535,000	Peter Formanek	3030 Poplar Ave., Memphis, TN 38111 (901) 325-4600	3
3.	Chief Auto Parts Inc.	500	0	290,000	Mike Manor	1515 Wade Drive, Seagoville, TX 75159 (214) 287-7474	2
4.	Western Auto	450 [2]	2,800	1,200,000	John T. Lundegard	2107 Grand Ave., Kansas City, MO 64108 (816) 346-4000	5
5.	Trak Auto	292	0	243,107	Edward E. Szydlik	3300 75th Ave., Landover, MD 20785 (301) 731-1200	6
6.	The Pep Boys	264	2,226	655,968	Mitchell Leibovitz	3111 W. Allegheny Ave., Philadelphia, PA 19132 (215) 229-9000	8
7.	Ward White Group [3]	250	140	250,000	Dean Haulton	1375 Mt. Prospect Rd., Des Plaines, IL 60018 (312) 699-5040	**
8.	Nationwise Automotive, Inc.	247	346	290,000	Saul Levy	3750 Courtright Ct., Columbus, OH 43227 (614) 239-1111	9
9.	Parts, Inc. [4]	175	42	125,000	J.H. "Buddy" Tankersley	606 S. Dudley, Memphis, TN 38104 (901) 523-7711	**
10.	Advance Stores Co.	150	0	85,000	Nicholas Taubman	1342 West Eighth, Roanoke, VA 24015 (703) 345-4911	11
11.	Sleego Auto Parts	147	0	190,000	Robert Sutherland	319 Clematis St., West Palm Beach, FL 33401 (407) 655-9700	10
12.	Super Shops	140	350	180,000	Harry Eberlin	620 Newport Center Dr., Ste 850, Newport Beach, CA 92660 (714) 644-9900	14
13.	PACCAR [5]	136	0	190,000	Ronald R. Hollyoak	1400 North 4th St., Renton, WA 98055 (206) 353-1234	**
14.	Discount Auto Parts, Inc.	125	0	100,000	Denis L. Fontaine	4900 S. Frontage Road, Lakeland, FL 33802 (813) 687-9226	21
15.	HALO Auto Supply Companies [6]	104	0	113,700	T. Michael Young	8601 Tavenor, Houston, TX 77057 (713) 991-6052	17
16.	O'Reilly Automotive (Ozark)	102	0	85,000	Charles O'Reilly	233 S. Patterson, Springfield, MO 65802 (417) 862-3333	15
17.	Aid Auto	88	0	55,000	Philip L. Stephen	475 Doughty Blvd., Inwood, NY 11696 (516) 371-4330	16
18.	ADAP	74	0	62,000	Wayne Yodzio	660 Bodwell St., Ext. Avon, MA 02322 (617) 587-8400	18
19.	Action Auto [7]	67	0	110,000	Dick Sabo	2128 S. Dort Hwy, Flint, MI 48507 (313) 236-5600	20
20.	Pettigrew-Smith/Dale's	58	1	50,000	Ben Docke	8119 Jensen Dr., Houston, TX 77093 (713) 695-3613	22
21.	Hi-Gear Tire & Auto Supply	56	0	27,000	Stan Love	110 Ritchie Rd., Capitol Heights, MD 20743 (301) 336-3000	23
22.	Quality Stores	54	29	165,000	John E. Hill	1460 Whitehall Rd., North Muskegon, MI 49445 (616) 744-2491	26
23.	Forest City Auto Parts Co., Inc.	50	0	***	Arnold Bellowe	25201 Chagrin Blvd., Ste 350, Beachwood, OH 44122 (216) 292-2525	24
24.	Big Bear Stores	47	0	32,000	Jerry Kammerer	640 54th Ave. N., St. Cloud, MN 56301 (612) 251-9000	25
25.	Ace Auto Parts	40	0	30,000	Thomas D. Cox	4351 34th St. N., St. Petersburg, FL 33714 (813) 526-1664	30
26.	Big Wheel Auto Stores	36	0	24,000	R.B. Shaller	1335 Mendota Heights Rd., Mendota Heights, MN 55120 (612) 452-7484	31
27.	Murray's Discount Auto Stores	35	0	9,500	Albert Pitt	21500 Trolley Ind. Dr., Taylor, MI 48180 (313) 292-2800	38
28.	Taylor Parts, Inc. (TPS)	32	0	55,000	James M. Taylor II	208 E. 3 Notch St., Andalusia, AL 36420 (205) 222-4813	27
29.	The Carport	32	0	15,000	David Fuhrman	3925 Rice Mine Rd., Northport, AL 35476 (205) 345-2400	39
30.	Worldwide Auto Parts, Inc.	31	7	19,000	Jim Foos (COO)	87 Brooklyn Ave., Youngstown, OH 44507 (216) 782-2204	36
31.	Parts City, Inc. (Alex. Seewald)	31	0	15,000	Andy Moye	1420 Seaboard Industrial Blvd., Atlanta, GA 30318 (404) 352-0146	32
32.	Twin "B" Auto Parts	30	0	16,000	William O'Connor	528 S. Military Hwy., Virginia Beach, VA 23464 (804) 420-3342	33
33.	10,000 Auto Parts of California	30	0	9,000	Lowell Fisher	310 W. 35th St., National City, CA 92050 (612) 533-7799	**
34.	Crazy Joe's	29	0	16,590	Joe Armentrout	460 Armentrout Dr., Concord, NC 28025 (704) 788-6551	34
35.	Linkon's Auto Supply	29	0	6,000	Leonard Linkon	2720 E. 2nd St., Centralia, IL 62801 (618) 533-1311	29
36.	Ben Pilla Speed Shops	28	0	11,000	Ben Pilla	118 N. Black Horse Pike, Bellmawr, NJ 08031 (609) 931-4041	28
37.	The Fox Group, Inc. [8]	27	0	16,000	William Fox, Jr.	23444 Schoenherr, Warren, MI 48089 (313) 774-4940	47
38.	One Stop Auto Parts	23	0	13,000	Gerald Klein	1113 62nd Ave. N., St. Petersburg, FL 33702 (813) 522-2897	35
39.	Foreign Autoparts	23	0	15,000	Steve Pollin	1205 Route One, Sharon, MA 02067 (617) 668-4444	**
40.	VIP Discount Auto	21	65	23,000	Thomas O. Auger	12 Lexington St., Lewiston, ME 04240 (207) 784-5464	44
41.	Acme Auto Supply, Inc.	21	0	8,000	James Fine	620 R Oakwood Ave., West Hartford, CT 06110 (203) 246-2540	37
42.	Gaking's Auto Stores	20	5	7,000	Albert C. Premus	117 W. Peach St., Connellsville, PA 15425 (412) 628-3340	42
43.	Beacon Auto Parts, Inc.	20	0	18,000	Fred Picciotto	911 Lowry Ave., Jeannette, PA 15644 (412) 527-5612	**
44.	Performance Centers of America	20	0	18,000	Donald R. Raleigh	180 Whitman Ave., Edison, NJ 08817 (201) 287-5200	48
45.	Royal Auto Supply	20	0	10,000	Jon Stenn	Twin Park Industrial Center, Colmar, PA 18915 (215) 822-1359	43
46.	Giant Auto Parts	19	0	13,500	Robert Levy	2256 S. Hamilton Ave., White Hall, OH 43232 (614) 864-3611	45
47.	Bennett Auto Supply	19	0	5,500	Allen Bennett	3869 N. Dixie Hwy, Oakland Park, FL 33334 (305) 565-4636	63
48.	Auto Parts World	18	0	7,200	Anthony Dabrowski	1176 W 14 Mile Rd., Clawson, MI 48017 (313) 288-0660	49
49.	Van Housen Auto Parts	17	0	11,000	Robert Neeley	2634 Juniper Lane, Sacramento, CA 95825 (916) 485-7562	53
50.	Champion Auto Stores [9]	16	0	75,000	Robert "Bud" Rose	5520 N. U.S. Highway 169, New Hope, MN 55428 (612) 535-8984	12

TOP ONEHUNDRED

AM'S LARGEST AFTERMARKET RETAILERS

1987-1988 was a good year for the big chains.

Much of this growth seems to be confined to a small number of large companies, however, as many medium- and small-sized companies actually consolidated, apparently closing smaller, less profitable stores. ■

51.	American Auto/Art's Auto Supply	15	0	13,000	Ken Millard	1011 Mason St., Omaha, NE 68108 (402) 345-1797	67
52.	National Auto Stores	15	0	11,000	David M. Stein	2342 North Penn Rd., Hatfield, PA 19440 (215) 997-1300	55
53.	Scherbas Auto Stores, Inc.	14	0	16,000	Ted R. Scherba	3910 El Camino Real, San Mateo, CA 94403 (415) 342-9415	57
54.	Knecht's Discount Auto Parts	14	0	13,000	Wally Knecht	3400 Main St., Springfield, OR 97478 (503) 746-4532	71
55.	Toohey's Auto Supply Co.	14	0	6,500	G.W. Toohey	149 E. Woodlawn Ave., Louisville, KY 40214 (502) 368-3897	61
56.	Kentucky Motor Service, Inc.	14	0	3,000	Anthony Neltner	235 Scott St., Covington, KY 41011 (606) 431-6025	65
57.	A&A Auto Stores, Inc. (Keystone)	14	3	***	Joseph Amato, Jr.	44 Tunkhannock Ave., Exeter, PA 18643 (717) 655-6871	60
58.	Auto, Truck & Van Associates	13	0	14,000	Walter A. Lahmann, Jr.	150 Engineers Rd., Hauppauge, NY 11788 (516) 435-4555	81
59.	B&C Auto Supply	13	0	12,000	Tony Gerbino	5491 Minnesota Dr., Anchorage, AK 99518 (907) 562-2047	51
60.	Fletcher Enterprises	13	116	12,000	Jerry Fletcher	2601 N. 32nd Ave., Phoenix, AZ 85009 (602) 269-1351	58
61.	Parks Auto Parts	13	0	6,500	Kenneth M. Parks	5429 Rivers Ave., Charleston, SC 29418 (803) 744-5278	86
62.	Scogin Auto Parts, Inc.	13	0	6,500	Joe W. Scogin	P.O. Box 618, Leesville, LA 71496-0618 (318) 239-4553	74
63.	Brad's Auto Parts Co.	13	0	8,000	Gary Davis	4946 S. Union St., Tulsa, OK 74107 (918) 445-0092	**
64.	Auto Barn Stores	12	0	19,000	Herbert Blumberg	13 Harbor Park Dr., Port Washington, NY 11050 (516) 484-9500	70
65.	Maynard Supply Co.	12	0	9,000	Lee Maynard	230 N. Winooski Ave., Burlington, VT 05401 (802) 658-4479	73
66.	Wall's Auto Parts	12	0	7,000	Walter H. Bryan, Jr.	6807 Stuart Ln. S., Jacksonville, FL 32205 (904) 781-0161	85
67.	Stinger Sam Auto Parts, Inc.	12	0	4,500	Neil Stenger	5602 W. 12th, Little Rock, AK 72204 (501) 666-4521	41
68.	Kissinger "Ultra"	12	0	3,000	Howard E. Jones	3100 N. Main St., Fort Worth, TX 76106 (817) 625-4333	54
69.	Ridge Auto Parts	11	12	25,000	James E. Goodhew	1535 S. Main St., South Bend, IN 46680-2859 (219) 234-3143	**
70.	Bomgaars	11	10	17,750	Harold A. Bomgaars	333 Water St., Sioux City, IA 51102 (712) 277-2000	76
71.	D.G. Nicholas Co.	11	0	7,000	James B. Nicholas	Box 270, 601-615 Wyoming Ave., Scranton, PA 18501 (717) 342-7683	78
72.	Johnnie's Discount Auto Supply	11	0	6,000	Johnnie Marshall	627 Main St., Garland, TX 75040 (214) 272-0451	62
73.	Hutchins Angert	10	0	15,000	L.J. Hutchins	2701 Military Rd., Niagara Falls, NY 14212 (716) 297-0222	80
74.	Blue Star Auto Stores	10	12	7,500	Eugene Weisman	2001 S. State St., Chicago, IL 60616 (312) 225-7174	82
75.	Economy Imports	10	0	7,000	Peter J. Blacklock	980 George St., Santa Clara, CA 95054 (408) 988-2452	83
76.	Professional Auto Parts Associates	10	0	4,200	Meyer Chernock	2230 Reisterstown Rd., Baltimore, MD 21217 (301) 669-0800	75
77.	Kar Parts, Inc.	10	0	3,000	Stanley Rak	1673 Oakdree Rd., Edison, NJ 08820 (201) 494-8403	84
78.	Dick Cepek, Inc.	9	0	22,000	Thomas Cepek	17000 Kingsview Ave., Carson, CA 90746 (213) 217-1805	**
79.	Parkway Auto Parts	9	0	10,000	Sonny Williams	1174 Forest Pkwy., Lake City, GA 30260 (404) 363-1096	88
80.	Indy Auto Stores, Inc.	9	0	6,000	Dennis Fitzgerald	8458 Sunland Blvd., Sun Valley, CA 91352 (818) 768-9018	89
81.	Hires Auto Parts	8	42	13,500	Richard Hire	7111 S. Anthony Blvd., Ft. Wayne, IN 46816 (219) 447-2582	93
82.	Rieth Auto Stores	8	0	6,000	Irv Phillips	36212 Euclid, Willoughby, OH 44094 (216) 941-7694	**
83.	Guy Henshall Supply Co., Inc.	8	0	4,500	Brian K. Franklin	901 S. Memorial, Tulsa, OK 74112 (918) 836-0057	79
84.	PV Performance Centers	8	2	3,000	Brian Peavey	124 Eastern Ave., Malden, MA 02148 (617) 321-7414	91
85.	Seventh Avenue Auto Parts	8	0	2,642	Robin Conant	112 N. 7th Ave., Phoenix, AZ 85001 (602) 257-8436	92
86.	Basolo Discount Auto Parts	8	1	2,500	John Basolo	801 59th St., Tulsa, OK 74120 (918) 592-1503	**
87.	Lappen's Discount Auto Parts	7	0	6,000	Joseph A. Lappen	94 Liberty St., Quincy, MA 02169 (617) 471-6000	**
88.	Rons Auto Parts/Performance	7	0	6,000	Ronald T. Uemura	2760 Kilihau St., Honolulu, HI 96819 (808) 836-2651	**
89.	ABC Discount Auto Parts	7	0	5,000	Louis Fishman	230 S. White Horse Pike Magnolia, NJ 080499 (609) 435-4862	**
90.	Inter-City Auto Stores, Inc.	7	50	1,600	Stanley Ginsberg	5975 NW 82nd Ave., Miami, FL 33166 (305) 592-9211	95
91.	Cal Auto	7	0	1,000	Bruce Levitan	780 Montague Expressway, Suite 603, San Jose, CA (312) 227-5051	**
92.	Academy Auto Parts	7	0	1,000	Terry Levine	380 N. Sawmill Rd., Elmsford, NY 10523 (914) 592-8501	**
93.	Monument Car Parts	6	0	9,000	Jim S. Munroe	5166 Pacheco Blvd., Pacheco, CA 94553 (415) 798-6330	**
94.	B&B Auto Parts	6	0	8,500	Tim Phillips	401 Ranier Ave. N., Renton, WA 98055 (206) 772-0904	98
95.	Eastside Auto Parts	6	0	8,000	Harry Bradt	8011 Truman Rd., Kansas City, MO 64126 (816) 231-8188	94
96.	Butler Auto Supply	6	0	7,000	Milton Butler	3243 Whitfield St., Macon, GA 31297 (912) 745-9295	56
97.	Jack's Auto Supply	6	0	6,000	Jack Mathews	1346 Chemical St., Dallas, TX 75207 (214) 630-6363	**
98.	Wingate Automotive	6	0	3,000	L Fred Anderson	900 NE 3rd Ave., Ft. Lauderdale, FL 33304 (305) 522-6211	96
99.	Holt Auto Parts	6	9	1,800	James Holt	252 Northside Dr., Atlanta, GA 30310 (404) 524-0617	**
100.	Osborne Distributing Co.	5	5	10,000	Lloyd O. Osborne	PO Box 2100, Vernon, TX 76384 (817) 552-7711	100
Total		6,135	6,264	6,545,806*			

* Reported or estimated for 1988.
** Not on last year's chart
*** Privately held, declined to release information
[1] Including Checker/Schuck's/Kragen, Auto Works, U-Save, and Crown Auto
[2] Includes company-owned stores only; with associate stores total is 1,850
[3] Includes Whitelock, Rose Auto, B&S/Strauss, Giant Auto, Motormart, National Auto, and Strum Auto
[4] Includes National Automotive Superstores, Save Auto Stores
[5] Includes Al's Auto Supply and Grand Auto
[6] Includes Fischer's Auto Parts
[7] Includes company-owned stores only; with franchises total is 71

AM's STATISTICAL SUPPLEMENT

How's the aftermarket doing? Some real answers from some real numbers.

by **P. Royall Kelcher**
Research Editor

Overall figures show continued, steady growth in the aftermarket. Sales of tires, parts, and accessories reached a high of $30,631,000,000 in 1988, up from $28,204,000,000 in the year before, according to the U.S. Department of Commerce's Bureau of Economic Analysis. In 1968, sales of these products were only $3,944,000,000. Even counting inflation gains, the aftermarket continues to grow at a healthy, if undramatic, rate.

However, sales of individual product lines vary, with both losses and gains being recorded over the past three years.

Sales of batteries, brake cleaners, carburetor cleaners, engine degreasers, lubricants and silicones, refrigerants, and tire inflators and sealants were up in 1988 compared to 1985. In some cases, the increases have been dramatic.

There were, for example, 8.5 million more cans of tire inflators and sealants sold in 1988 than there were in 1985—a product category that has been developed through consumer advertising and education. Increased use of car air conditioning led to a 12.8 million refrigerant can sales jump from 1985 to 1988.

There were some downsides, too. Battery unit sales dropped 5.2 million between 1985 and 1988. Sales of antifreeze/coolant, motor oil, exterior cleaning products, and windshield and lock de-icers took a dip from 1985.

Take, for example, antifreeze/coolant. Sales in 1985 were some 143.9 million separate gallons (i.e., individually packaged gallons of antifreeze/coolant rather than sold in bulk sizes). This took a tremendous drop in 1986 to 121.9 million separate gallons, but climbed back to 140.9 million separate gallons in 1988. In other words, sales of antifreeze/coolant in 1988 almost reached the 1985 levels—despite product shortages in some areas of the country. De-icer sales drops can be attributed directly to last Winter's warmer-than-usual weather.

The Nation's Fleet

The country's motor vehicle population continued to grow in 1988, with 171,609,549 vehicles on the road. California continued to lead the nation in registered motor vehicles with some 19.2 million cars and light trucks on its roads. California has registered 11.9% of all vehicles on U.S. roads. Texas was second,

PRIME DIYERS' CARS

DIYers do the most work on cars that are around seven years old instead of newer or older. Stocking, therefore, to meet their demands requires knowing what sort of cars sold best seven years ago. Below, we list the 1983 car models and the numbers of each specific model sold that year. The scrappage rate of these cars between 1981 and 1985 was 5.8%.

Cars	Number Sold
Alfa Romeo	3,002
AMC	
Spirit (Gremlin/AMX)	4,441
Concord (Hornet)	11,513
Eagle	31,207
Renault Alliance	126,008
BMW	**59,243**
Chrysler	
Turismo (TC3)	36,497
Horizon 4-door	56,763
Reliant	157,247
Gran Fury	15,101
LeBaron	80,309
Cordoba	10,291
Fifth Ave. (Chrysler)	73,729
E-Class	35,283
Imperial	1,237
Laser	11,097
New Yorker (E)	50,091
Charger (O24)	45,975
Omni 4-door	50,451
Aires	119,400

Cars	Number Sold
Daytona	8,761
Dodge 600/400	28,488
Diplomat	22,603
Miranda (Magnum)	4,417
Dodge 600 4-door	33,882
DeLorean	**1,009**
Fiat	**7,349**
Ferrari	549
Fiat	6,180
Lancia	620
Ford	
Ford	119,905
Thunderbird	134,710
LTD	165,396
Granada	3,751
Fairmont	37,521
Tempo	136,148
Escort	326,333
EXP	19,574
Mustang	116,976
Mercury	96,659
Cougar	87,933

Cars	Number Sold
Marquis	65,184
Zephyr (Comet)	11,583
Topaz	41,796
Lynx	78,876
LN7	4,694
Capri	22,708
Lincoln	59,626
Mark	28,257
Continental	13,691
Versailles	13,691
General Motors	
Chevrolet	
Chevrolet	238,930
Corvette	28,144
Monte Carlo	105,797
Celebrity (Malibu)	265,775
Camaro	178,266
Citation (Nova)	92,379
Cavalier (Monza)	259,397
Chevette	178,759
Pontiac	
Pontiac	26,929

Cars	Number Sold
Grand Prix	89,355
6000	176,635
Firebird	90,777
Phoenix	24,362
Fiero	22,591
Sunbird/2000	88,313
1000	34,173
Oldsmobile	
Oldsmobile	348,298
Toronado	41,791
Cutlass/Ciera	522,899
Omega	49,818
Forenza (Starfire)	44,753
Buick	
Buick	231,661
Riviera	53,346
Century/Regal	348,315
Skylark	102,763
Skyhawk	72,998
Cadillac	
Cadillac	176,003
Eldorado	71,624

Cars	Number Sold
Seville	33,522
Cimarron	19,188
Honda	**350,670**
Accord	171,735
Civic	137,747
Isuzu	**20,731**
Jaguar (SL)	**15,815**
Mazda	**173,388**
Mercedes-Benz	**73,692**
Mitsubishi	**32,755**
Nissan	**521,902**
Peugeot	**15,687**
Toyota	**555,766**
Volvo	**88,857**
Volkswagen	**220,171**
Audi	47,934
Porsche	21,831
Volkswagen	77,048
Golf (US-made)	73,911
Jetta (US-made)	230

Sources: Domestic car data, Motor Vehicle Manufacturers Association. Imported car data, copyright 1985, Ward's Communications, Inc. Reprinted with permission.

PERSONAL CONSUMPTION EXPENDITURES FOR TRANSPORTATION (in millions)

	1966	1968	1970	1972	1974	1976	1978	1980	1982	1984	1985	1986	1987	1988
Tires, Parts, Accessories	3,434	3,944	6,065	7,970	9,639	11,367	13,706	16,684	20,234	23,421	24,363	26,567	28,204	30,631
Repairs [1]	7,393	8,864	11,248	13,922	17,615	22,134	28,016	32,327	35,441	42,838	45,965	51,784	56,364	62,937
Gas, Oil	15,962	18,422	21,997	24,879	36,293	43,046	51,301	83,721	89,090	90,006	91,847	73,299	77,036	78,768

[1] Includes lubricating, washing, parking, storage, and rental.
Source: Motor Vehicle Manufacturers Association, U.S. Department of Commerce, Bureau of Economic Analysis

with 11.8 million registered vehicles, while that booming sunbelt state, Florida, finished third with 10.2 million vehicles.

At the other end of the list, the District of Columbia had only 336,081 vehicles registered. Vermont, which for years was inhabited by more cows than people, had only 427,292 cars and light trucks. The wide-open state of Wyoming had the third smallest fleet with 431,565 vehicles.

State	Passenger Cars 1975	Passenger Cars 1985	Passenger Cars 1987	Light Trucks 1987	Total Fleet 1987
Alabama	1,900,295	2,343,261	2,633,403	802,219	3,435,622
Alaska	142,717	219,590	225,141	113,812	338,953
Arizona	1,064,348	1,582,722	1,712,441	659,660	2,372,101
Arkansas	864,803	900,065	935,599	444,078	1,379,677
California	11,226,325	14,723,189	15,714,903	3,455,220	19,170,123
Colorado	1,439,779	2,016,522	2,220,941	698,397	2,919,338
Connecticut	1,793,158	2,306,432	2,448,501	120,439	2,568,940
Delaware	289,164	369,407	383,174	88,373	471,547
District of Columbia	236,010	308,343	328,000	8,081	336,081
Florida	4,449,154	7,849,144	8,521,630	1,685,627	10,207,257
Georgia	2,509,519	3,358,953	3,597,364	1,245,442	4,842,806
Hawaii	349,619	569,086	603,809	71,611	675,420
Idaho	406,593	531,854	579,462	308,331	887,793
Illinois	5,350,375	6,104,331	6,242,279	1,240,742	7,483,021
Indiana	2,565,270	2,988,820	2,748,356	733,924	3,482,280
Iowa	1,542,796	1,937,601	1,936,924	551,900	2,488,824
Kansas	1,241,497	1,474,205	1,501,752	546,674	2,048,426
Kentucky	1,675,990	1,773,567	1,811,098	772,059	2,583,157
Louisiana	1,661,389	2,067,013	1,953,327	848,215	2,801,542
Maine	499,474	620,473	694,596	192,511	887,107
Maryland	2,072,302	2,720,700	2,718,947	500,884	3,219,831
Massachusetts	2,775,670	3,268,503	3,392,975	403,058	3,796,003
Michigan	4,627,816	5,356,975	5,481,096	1,155,452	6,636,548
Minnesota	1,952,401	2,625,831	2,466,150	509,070	2,975,220
Mississippi	989,844	1,329,424	1,344,842	345,502	1,690,344
Missouri	2,177,361	2,622,141	2,667,100	906,300	3,573,430
Montana	370,000	394,510	415,728	187,950	603,678
Nebraska	824,285	835,785	866,933	329,795	1,196,728
Nevada	345,648	511,760	588,613	199,534	788,147
New Hampshire	404,574	813,600	687,873	154,493	842,366
New Jersey	3,735,985	4,413,999	4,957,598	398,987	5,356,585
New Mexico	554,578	746,068	802,823	431,451	1,234,274
New York	6,735,148	7,901,004	8,361,175	1,015,678	9,376,853
North Carolina	2,860,249	3,247,486	3,491,660	1,127,742	4,619,402
North Dakota	330,851	381,200	383,246	191,165	574,411
Ohio	6,206,000	6,288,050	7,001,690	1,251,780	8,253,470
Oklahoma	1,432,477	1,854,553	1,931,117	808,337	2,739,454
Oregon	1,331,000	1,320,294	1,657,107	466,203	2,123,310
Pennsylvania	6,589,466	5,889,416	6,180,970	1,102,379	7,283,349
Rhode Island	498,777	518,896	543,768	90,922	634,690
South Carolina	1,400,479	1,683,435	1,782,844	511,799	2,294,643
South Dakota	336,062	404,220	409,571	222,921	632,492
Tennessee	2,092,996	2,944,971	3,194,605	724,456	3,919,061
Texas	6,217,464	8,562,581	8,398,231	3,375,523	11,773,754
Utah	587,133	739,627	753,776	317,749	1,071,525
Vermont	233,390	301,435	329,946	97,346	427,292
Virginia	2,709,506	3,641,696	3,614,251	862,143	4,476,394
Washington	1,883,271	2,484,484	2,702,000	965,543	3,667,543
West Virginia	734,659	818,678	821,035	309,465	1,130,500
Wisconsin	2,126,273	2,457,806	2,378,474	585,346	2,963,820
Wyoming	202,267	286,118	281,936	149,629	431,565
Total	106,712,551	132,108,164	137,323,632	34,285,917	171,609,549

Last year was a year of delight for those involved in making and retailing light truck accessories. This is, however, a regional market. In Florida and New York, two examples in different areas of the country, one out of every nine vehicles on the road is a light truck. In Pennsylvania, it's one out of every seven vehicles. But in Texas one out of every four vehicles is a light truck. There's one light truck for every three vehicles in Missouri, too.

Looking At Drivetrain Parts

Finally, we're highlighting the potential growth of a specific product category. This year we're looking at drivetrain parts, as studied by the Automotive Market Research Council, Englewood Cliffs, NJ.

According to the study, the drivetrain segment of the aftermarket is forecast to grow at a healthy 4.5% per year through 1992, while the entire industry is seen as growing only 1.6% in real terms, not counting inflation. Broken down, cv-joints are seen as the fastest growing product line, with an annual 15.9% growth rate. ■

Item	1987	1992
Universal Joints	425	405
Clutches & Parts	1,633	1,933
CV Joints	525	1,096
All Drive Train Parts	4,426	5,518

Source: Allomatic Industries, Inc., Woodside, NY

Item	Unit	1988
Antifreeze/ Coolant	Gallons, Separate	140,890,169
Automotive Engine Oil	Thousand Gallons	1,105,750
Batteries, Replacement	Batteries	63,847,000
Cleaners, Brake	Tinplate Containers	27,873,209
Cleaners, Carb & Choke	Tinplate Containers	53,434,555
Cleaners, Exterior	Tinplate Containers	15,264,637
Degreasers, Engine	Tinplate Containers	25,247,930
De-Icers, Windshield, Lock	Tinplate Containers	5,354,029
Lubricants & Silicones	Tinplate Containers	87,055,076
Refrigerants	Tinplate Containers	84,967,712
Tire Inflators & Sealants	Tinplate Containers	32,219,659